IBM Unica Campaign
Version 8 Release 5
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*User's Guide*

IBM

This edition applies to version 8, release 5, modification 0 of IBM Unica Campaign (product number 5725-D22) and to all subsequent releases and modifications until otherwise indicated in new editions.

# Contents

# Chapter 1. Preface

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM® Unica® technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

## Information to gather

Before you contact IBM Unica technical support, gather the following information:
- A brief description of the nature of your issue.
- Detailed error messages you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System information."

## System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the version.txt file located under the installation directory for each application.

## Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (http://www.unica.com/about/product-technical-support.htm).

# Chapter 2. Introduction to IBM Unica Campaign

Campaign is a Web-based Enterprise Marketing Management (EMM) solution that consists of a back-end server, a web server, an ActiveX client, and Marketing Platform security. Campaign enables users to design, execute, and analyze direct marketing campaigns.

Campaign provides an easy-to-use graphical user interface that supports the direct marketing processes of selecting, suppressing, segmenting, sampling, and creating output lists of customer IDs. Campaign's Universal Dynamic Interconnect (UDI) data communication layer allows you to seamlessly access and manipulate data from all of your data sources, including relational databases (regardless of database type) or flat files.

Campaign processes populate contact history and response history, and support response attribution and reporting.

Although the application supports raw SQL, macros, and functions, users do not need to know SQL to design campaigns. Once mapped, database tables can easily be selected, merged, sampled, and segmented and the resulting customers can be associated with a variety of offers. Also, the results of a campaign can be recorded, responses tracked, and the return on investment (ROI) calculated. Campaigns can be scheduled to run at a particular time or triggered by a particular event, all without knowledge of SQL.

Campaign treats a marketing campaign as a discrete entity that is made up of one or more flowcharts, which are in turn comprised of one or more processes. A campaign can be associated with one or more strategic segments, offers, and reports, and can consist of multiple flowcharts.

The processes, which are the building blocks for campaign flowcharts, are the heart of Campaign, as they perform the actual data manipulation, scheduling, offer matching, list generation, and optimization; in effect, you use the processes to define and implement a campaign.

## Who uses Campaign?

Campaign is designed to be used by marketing experts, as well as by experts in data-mining, On-Line Analytical Processing (OLAP), and SQL.

Campaign *users* design, execute, and analyze direct marketing campaigns. Campaign *administrators* lay the groundwork for their colleagues by performing initial and ongoing tasks such as mapping database tables, adjusting configuration settings, and defining custom attributes and offer templates for users.

For more information about tasks performed by Campaign administrators, see the *Campaign Administrator's Guide*.

## Integration with other IBM Unica products

Campaign optionally integrates with the following IBM Unica products:

- **Distributed Marketing** to support distributed, custom execution of centrally managed campaigns.
- **eMessage** for constructing targeted, measurable email marketing campaigns.
- **Interact** to retrieve personalized offers and customer profile information in real-time to enrich the interactive experience. For information on using Interact features in Campaign, including the use of interactive flowcharts and Interact processes on batch flowcharts, see the IBM Unica Interact documentation.
- **Marketing Operations** to integrate the marketing resource management features of Marketing Operations with the campaign development features of Campaign. For more information, see "About integration with IBM Unica Marketing Operations."
- **CustomerInsight** to provide access to CustomerInsight group selections when designing direct marketing campaigns.
- **NetInsight** to provide access to NetInsight visitor segments when designing direct marketing campaigns.
- **Optimize** to optimize contacts from a customer-centric perspective while considering business rules and constraints.
- **PredictiveInsight** to leverage scoring of predictive models for response modeling, cross-selling, customer valuation, and segmentation.

For more information on the use of other IBM Unica products integrated with Campaign, see the documentation included with those products.

## About integration with IBM Unica Marketing Operations

Campaign can be integrated with Marketing Operations to use its marketing resource management features to create, plan, and approve campaigns.

When Campaign is integrated with Marketing Operations, many of the tasks previously performed in a stand-alone Campaign environment are performed in Marketing Operations. These tasks include:

- Working with campaigns:
  - Creating campaigns
  - Viewing, moving, and deleting campaigns
  - Working with campaign summary details
- Managing offers (if offer integration is enabled):
  - Creating offer templates
  - Defining offer attributes
  - Creating, editing, approving, and retiring offers
- Working with Target Cell Spreadsheets
- Assigning offers to cells
- Specifying control cells
- Creating and populating custom campaign attributes
- Creating and populating custom cell attributes

The tasks listed above are explained in the *Marketing Operations-Campaign Integration Guide*.

The following tasks are performed in Campaign in both stand-alone and integrated environments:

- Creating flowcharts

- Running flowcharts
- Detailed analysis of campaigns/offers/cells
- Reporting on Campaign performance (depending on the reporting pack installed)

## About legacy campaigns

Legacy campaigns refer to pre-existing campaigns created in Campaign (or Affinium Campaign 7.x) prior to enabling integration. In a Marketing Operations–Campaign integrated environment, Campaign can be configured to access the following types of legacy campaigns:

- Campaigns created in stand-alone Campaign (whether in the current or a previous version of Campaign) before version 8.0 integration was enabled. These campaigns cannot be linked to Marketing Operations projects.
- Campaigns created in Affinium Campaign 7.x and linked to Affinium Plan 7.x projects. Functionality of these campaigns remains unchanged from version 7.x of these products, based upon the data mapping between attributes in both products.

You can access and work with both types of legacy campaigns using Campaign, even after enabling version 8.0 integration, which applies to all newly created campaigns.

## Campaign concepts

The basic concepts that you should understand before using Campaign include:
- "Campaigns"
- "Flowcharts" on page 6
- "Sessions" on page 6
- "Processes" on page 6
- "Offers" on page 6
- "Cells" on page 7

## Campaigns

You create campaigns in Campaign to manage and reflect a direct marketing campaign. Each campaign is defined by the following elements:
- name
- security policy
- description
- objective
- campaign code
- effective and expiration dates
- initiatives
- owner
- any customized attributes

Campaigns include one or more *flowcharts* that you design to perform a sequence of actions on your data for executing your campaigns.

## Flowcharts

In Campaign, flowcharts represent a sequence of actions that you perform on your data. Every action is defined by a building block, called a *process.* By configuring and joining processes, you can manipulate the underlying data to achieve your goals. Flowcharts can be run manually, by a scheduler, or in response to some defined trigger.

You use flowcharts to accomplish particular marketing goals, such as determining qualified recipients for a direct mail campaign, generating a mailing list for this group of recipients, and associating each recipient with a particular offer. You can also use flowcharts to track and process respondents to your campaign, and to calculate your return on investment for the campaign.

For each campaign, you design one or more flowcharts to implement the campaign, configuring the processes that make up the flowchart(s) to perform the required data manipulation or action.

Each flowchart has the following elements:
- name
- description
- processes that are configured and connected
- one or more data sources

Licensed users of Interact can also use Campaign to run real-time *interactive flowcharts* that depend on the occurrence of an event. For more information on interactive flowcharts, see the *Interact User's Guide*.

## Sessions

A session is a special place in the application where fundamental, persistent, global data constructs (such as strategic segments and cubes) are created by Campaign administrators and then made available to all campaigns. Like campaigns, sessions are also comprised of individual flowcharts.

## Processes

Flowcharts are comprised of individual processes that are configured to perform a particular task in a campaign or session, such as selecting data, merging two distinct audience groups, or writing out the results of the campaign.

## Offers

An offer represents a single marketing message, which can be delivered in a variety of ways.

In Campaign, you create offers that can be used in one or more campaigns.

Offers are re-usable:
- in different campaigns;
- at different points in time;
- for different groups of people (cells);
- as different "versions" by varying the offer's parameterized fields.

You assign offers to target cells in flowcharts using one of the contact processes, and track your campaign results by capturing data about customers who received the offer, and customers who responded.

## Cells

A cell is simply a list of identifiers (such as customer or prospect IDs) from your database. In Campaign, you create cells by configuring and running data manipulation processes in flowcharts. These output cells can also be used as input for other processes in the same flowchart (downstream from the process which created them). There is no limit to the number of cells you can create.

Cells to which you assign one or more offers in Campaign are called target cells. A target cell is a distinct group of homogeneous individuals (or whatever the entity is for which the audience level is defined, such as individual customers, or household accounts). For example, cells can be created for high-value customers, customers who prefer to shop on the web, accounts with on-time payments, customers who have opted to receive email communications, or loyal repeat buyers. Each cell or segment you create can be treated differently, receiving different offers or communications via different channels.

Cells containing IDs qualified to receive an offer but that are excluded from receiving the offer for analysis purposes are called control cells. In Campaign, controls are always hold-out controls.

The term "cell" is sometimes used interchangeably with "segment." Strategic segments are cells that are created in a session rather than in a campaign flowchart. A strategic segment is no different from other cells (such as those created by a Segment process in a flowchart) except that it is available globally, for use in any campaign. A strategic segment is a static list of IDs until the flowchart that created it originally is re-run.

# Chapter 3. Getting started with Campaign

Before meaningful work can be done in Campaign, database tables must be mapped, data objects such as segments, dimensions, or cubes might need to be created, and individual campaigns must be planned and designed. These tasks are initially performed with the help of a IBM Unica consultant with the expectation that the initial campaign and this guide allow you to design and run additional campaigns yourself – or refine, expand, and build upon an initial campaign with varying degrees of assistance.

For more information about configuration and other administrative tasks, see the *Campaign Installation Guide* and the *Campaign Administrator's Guide*.

## Your username and password

To access Campaign, you must have a username and password combination that has been created for you in Marketing Platform, and also be authorized to access Campaign.

If you do not have a valid username and password, contact your system administrator.

## To log in to IBM Unica Marketing

Before you begin working with IBM Unica Marketing, you need the following.
- An intranet (network) connection to access your IBM Unica Marketing server.
- Microsoft Internet Explorer installed on your computer.
- User name and password to sign in to IBM Unica Marketing.
- The URL to access IBM Unica Marketing on your network. If you are uncertain of the correct URL or need a user name or password, contact your IBM Unica Marketing administrator.

1. Launch the Microsoft Internet Explorer browser.
2. Enter the IBM Unica Marketing URL in the browser's address field.

   If IBM Unica Marketing is integrated with Windows Active Directory or with a web access control platform, and you are logged on to that system, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator. Your login is complete. Otherwise, a login page appears.

   If your version of IBM Unica Marketing uses SSL, you may be prompted to accept a digital security certificate the first time you sign in. Click **Yes** to accept the certificate.
3. Enter your user name and password, then click **Sign In**.

   A Change Password page may display, depending on how IBM Unica Marketing password rules are configured. Enter a new password, confirm by entering it again, and click **Change Password**.

If your login is successful, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator.

# Your role and permissions

Your user name in Campaign is associated with one or more roles, such as Reviewer, Designer, and Manager. Your administrators define roles specific to your organization. Your roles determine the functions that you can perform in Campaign. The object-level security implemented by your organization determines whether you can perform those functions on specific objects. If you need to access objects or perform tasks that your permissions do not allow, contact your system administrator.

# Security levels in Campaign

Security in Campaign works on two levels:

- **Functional -** Determines the actions that you can perform on types of objects, based on the role(s) that you belong to. Your organization defines these roles at implementation, and each role has a set of permissions associated with it, that determine what actions a user belonging to a role can perform. For example, if you are a user assigned a role called "Administrator", you might have permissions to map and delete system tables, while if you are a user assigned the role called "Reviewer" you might be denied permissions to map and delete system tables.
- **Object -** Defines the of object types on which you can perform your allowed actions. In other words, even if you belong to a role that has general permissions granted to edit campaigns, object-level security for Campaign can be set up so that you cannot access campaigns residing in particular folders. For example, if you belong to Division A, regardless of your functional roles, you can be disallowed from accessing the contents of folders belonging to Division B.

# Setting your start page

If you do not want a dashboard page to appear when you first log in to IBM Unica Marketing, you can select a page from one of the installed IBM products as your start page.

To set a page you are viewing as your start page, select **Settings > Set current page as home**. Pages available for selection as a start page are determined by each IBM Unica Marketing product and by your permissions in IBM Unica Marketing.

On any page you are viewing, if the **Set current page as home** option is enabled, you can set the page as your start page.

# Chapter 4. Campaigns

Campaigns are made up of one or more flowcharts that you design to perform a sequence of actions on your data for executing your campaigns. Flowcharts are made up of processes, which you configure to perform the actual data manipulation, contacts, scheduling, and response tracking required for your campaign. In effect, the processes are how you define and implement a campaign.

For an example of flowcharts designed for a retention campaign using multiple channels to deliver an offer, see "Example: Multi-Channel Retention Campaign."

## Preparing the data for campaigns

To prepare the data for a campaign, you first need to tell Campaign which tables or files in your data source contain information about your customers and products. Mapping your data into Campaign makes this data available to processes for manipulation. For details, see the sections on database table administration in the *Campaign Administrator's Guide*.

You might also need to create offers, strategic segments, and other data objects for use in your campaigns. For information on creating objects for use in campaigns, see Chapter 10, "Stored objects," on page 167.

## Designing campaigns

Before creating a campaign, you should have already designed it on paper and determined the goals for the campaign. Once you have designed a campaign on paper, you will implement it in Campaign by creating a campaign and creating one or more flowcharts to accomplish the objectives of your campaign.

Campaigns are comprised of one or more flowcharts. Flowcharts are comprised of interconnected processes. The processes combined in a flowchart are the heart of Campaign, since they perform the actual data manipulation, contacts, scheduling, and response tracking; in effect, the processes are how you define and implement a campaign.

### Example: Multi-Channel Retention Campaign

This example shows a retention campaign that uses multiple channels to deliver an offer to customers that might be lost through attrition.

Two flowcharts are required: one to generate the lists of customers to which the offer will be sent (via a different channel for each segment), and a second to track responses to the offer and write the response data out for reporting and analysis.

#### Contact flowchart

The contact flowchart aims to select the eligible customers in each value segment, and output contact lists for a different channel for each segment.

**A sample retention campaign flowchart**
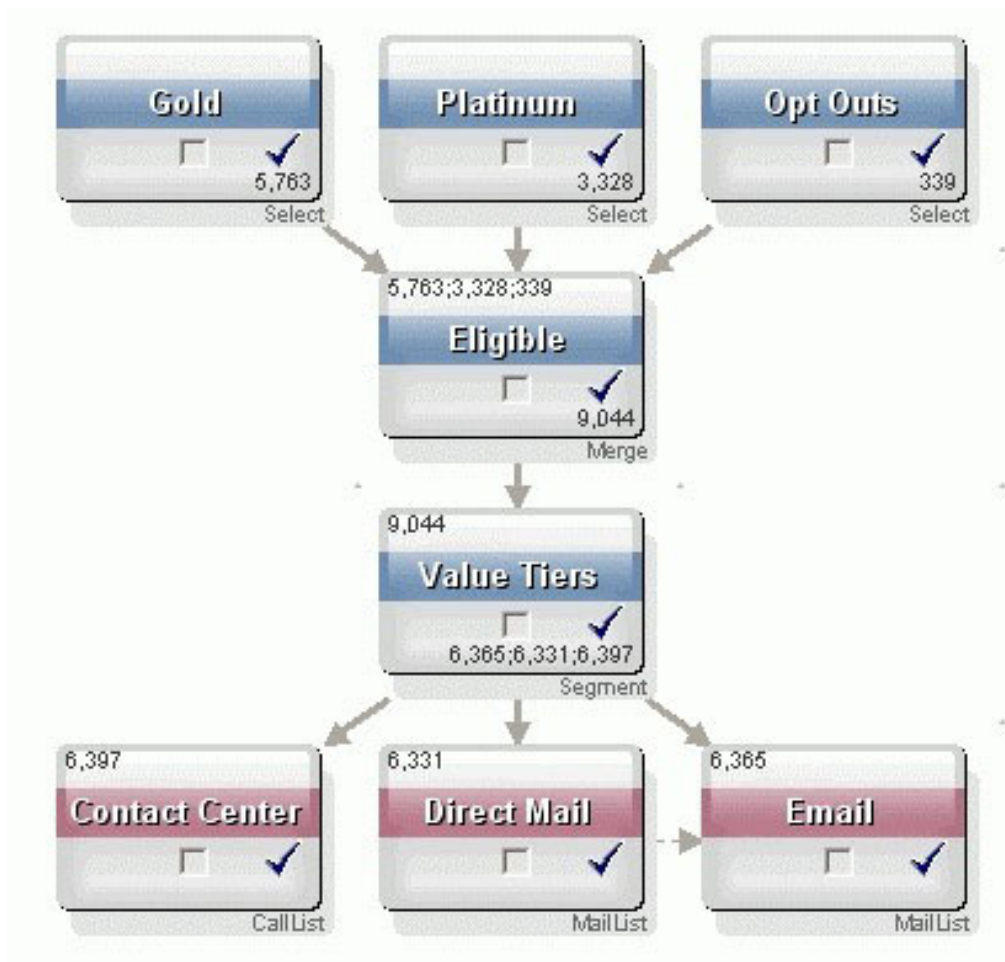
In the first tier of the flowchart, two Select processes select the customers in the Gold and Platinum segments, while a third Select process contains the list of customers who have opted out of marketing communications.

In the second tier, a Merge process combines the Gold and Platinum customers, and excludes any who have opted out.

The third tier uses a Segment process to segment all eligible customers into value tiers based on their scores.

Finally, the high-value customers are output to a call list using a Call List process, to be contacted by phone with the offer. The medium-value customers are output to a mail list using a Mail List process, and will receive a direct mailing with the offer. The lowest value customers will receive the offer via email.

## Response flowchart

A second flowchart in this same campaign tracks responses to the phone, direct mail, and email offers captured by the call center and response capture systems. Response information is then available through the various performance reports in Campaign.

**Retention campaign's response tracking flowchart**
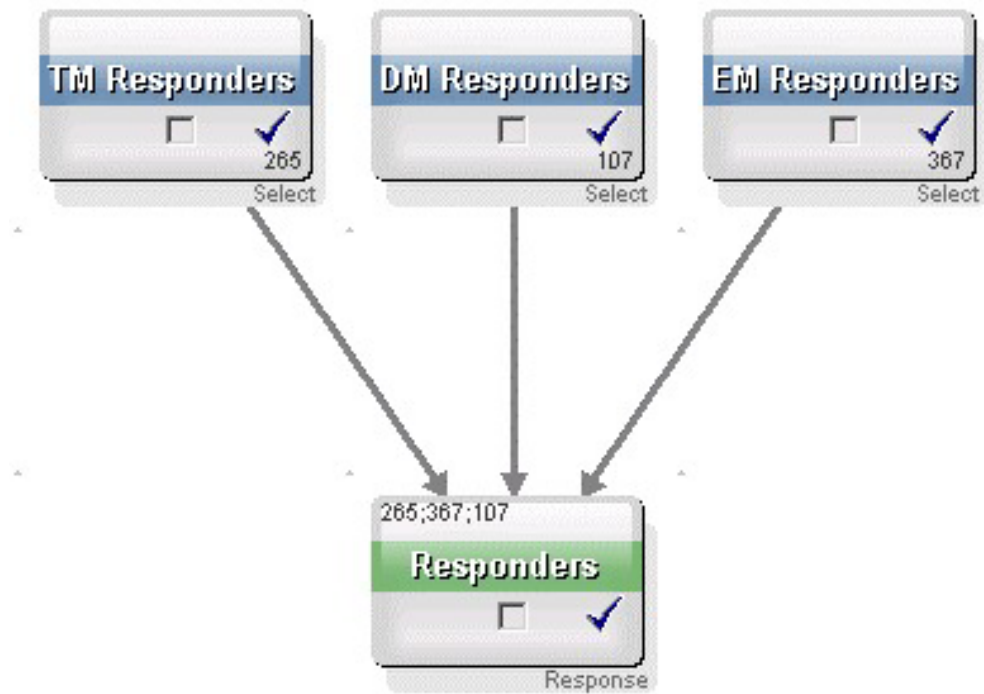
## About accessing campaigns

You access campaigns from the All Campaigns page, available from the **Campaign > Campaigns** link in the menu.

The information displayed on the All Campaigns page depends upon how your Campaign environment is configured.

- **Stand-alone Campaign environment**—The All Campaigns page displays all campaigns and campaign folders for which you have at least read access.
- **Integrated Marketing Operations–Campaign environment**—If access to legacy campaigns has been enabled, the All Campaigns page displays only legacy campaigns. Otherwise, no campaigns are listed on this page. Campaigns created through Marketing Operations are accessed through campaign projects.

For more information about legacy campaigns, see "About legacy campaigns" on page 5. For information on configuring Campaign to enable access to legacy campaigns, see the installation documentation.

If you want to access campaign projects created in Marketing Operations from the All Campaigns page, click the link for the **Campaign Projects** folder. This folder provides access to the projects view in Marketing Operations. The projects that display depend upon the default project view that you have set in Marketing Operations. You can configure this to display all campaign projects if desired.

For more information about campaign projects, see the *Marketing Operations and Campaign Integration Guide*. For more information about project views, see the *Marketing Operations User's Guide*.

**Note:** The **Campaign Projects** folder cannot be deleted, moved, or copied.

# Working with campaigns

This section describes the tasks you can perform with campaigns in Campaign.

**Note:** If your Campaign environment is integrated with Marketing Operations, you must use the campaign projects in Marketing Operations to work with campaigns. If your Campaign environment has pre-existing campaigns created before the integration was enabled and Campaign is configured to access legacy campaigns, use the instructions in this guide to work with these campaigns. For more information, see "About integration with IBM Unica Marketing Operations" on page 4.

**Note:** Working with campaigns requires the appropriate permissions. For information on permissions, see the *Campaign Administrator's Guide*.

## To create a campaign

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition.
2. Navigate through the folder structure until you have opened the folder to which you want to add your campaign.
3. Click the **Add a Campaign** icon.

   The New Campaign page appears.
4. Complete the fields in the Campaign Summary.
5. When you have finished entering your campaign summary details, click **Save and Finish**.

   The Campaigns page lists the new campaign.

   **Note:** You can also click **Save and Add a Flowchart** to immediately start creating your campaign's flowcharts. However, it may be better to associate the appropriate segments and offers to your campaign before creating flowcharts, which makes selecting customers and creating contact lists in your flowcharts easier.

## Associating strategic segments with a campaign

A strategic segment is a list of IDs created by your system administrator (or an advanced user) in a session and made available to all campaigns. A strategic segment is no different from other segments (such as those created by the Segment process) except that it is available globally, for use in any campaign.

Associating a strategic segment with your campaign makes it easier to select that segment when you are creating your flowcharts. Associating the relevant strategic segments with your campaign also provides greater reporting capabilities within Campaign.

### To associate a segment with a campaign

1. On the Campaign Summary tab, click the **Add/Remove Segments** icon.

   The Add/Remove Segments window appears.
2. Select the segment you want to add:
   - Click the folders to navigate through them until you locate the segment you want to add;

- Click **Tree View/List View** to change the segment list view, then navigating to the segment you want to add;
- Click **Search** to access the Search tab, where you can enter a name or description to find the segment you want to add.

3. Select the segment(s) you want to add, and click **>>** to move them to the **Included Segments** list. You can select multiple segments using **Shift+Click** or **Ctrl+Click**.
4. Click **Save Changes** when you have finished selecting segments to associate with this campaign.

The segments you added are listed on the Campaign Summary page under **Relevant Segments**.

**Note:** When you use the Select process to select customers in your campaign flowcharts, segments associated with your campaign will appear at the top of the list, making them easy to locate.

## Associating offers with a campaign

Associating offers with your campaign when you define the campaign makes it easier to select that offer when you are assigning offers to cells in contact processes. Defining the relevant offers for a campaign from the Campaign Summary tab is referred to as "top down" association; when an offer is simply used in a flowchart without first associating it with a campaign, it is referred to as "bottom up" association.

### To associate an offer "top down" from the Campaign Summary tab

1. On the Campaign Summary tab, click the **Add/Remove Offers** icon.

   The Add/Remove Offers window appears.
2. Select the offer you want to add:
   - Click the folders to navigate through them until you locate the offer you want to add;
   - Click **Search** to access the Search tab, where you can enter a name, description or code to find the offer you want to add.
3. Select the offer(s) you want to add, and click **>>** to move them to the **Included Offers** list. You can select multiple segments using **Shift+Click** or **Ctrl+Click**.
4. Click **Save Changes** when you have finished selecting offers to associate with this campaign.

The offers you added are listed on the Campaign Summary tab under **Relevant Offers**. They appear grayed out until you use them in a flowchart in this campaign.

The Campaign Summary tab Relevant Offers section lists all of the offers associated with a campaign. Offers associated "top down" are visually distinguished from those associated from "bottom up": an asterisk next to the name of an offer indicates that that offer was associated with the campaign using the "top down" method. Offers that were used directly in a flowchart without first being defined top down appear without an asterisk. Offers that were defined top down and are not yet used in a flowchart appear grayed out until they have been used in a flowchart.

When you use a contact process to create contact lists in your campaign flowcharts, any offers defined top down will appear at the top of the list, making them easy to locate and select for assignment to one or more target cells.

## To view a campaign

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition.

2. Navigate to the folder containing the campaign you want to view.

3. Click the name of the campaign you want to view to open the campaign to its Summary tab.

   OR

4. Click the **View a tab** icon next to the name of the campaign you want to view.

   Choices for the **Summary**, **Target Cells**, and **Analysis** tabs appear (across the top of the Campaign display, or on a pop-up menu), and a choice for viewing each flowchart in the campaign (if any) also appears.

5. Click the campaign tab you want to view.

   The campaign opens to the tab you selected.

## To navigate from a linked legacy campaign to a Marketing Operations project

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition. Only legacy campaigns are listed.

   To view campaigns created with Marketing Operations–Campaign integration enabled, click the **Campaign projects** folder. If there are no legacy campaigns or legacy campaigns have not been enabled in the configuration, this page will always be empty.

2. Click the name of the campaign you previously linked to a project in Affinium Plan.

   The campaign opens to its **Summary** tab.

3. Click the name of the project displayed in the **Related Project** field.

   Marketing Operations opens, displaying the **Summary** tab of the linked project.

4. To return to Campaign, click the name of the project in the (**Related Campaign (Code)**) field in Marketing Operations.

## To edit a campaign's Summary details

1. On the Campaigns page, click the name of the campaign whose summary details you want to edit.

   You can also click the **Edit a tab** icon and select Summary from the context menu to access the campaign Summary directly in Edit mode.

   The campaign opens to its **Summary** tab.

2. Click the **Edit Summary** icon.

3. Make your desired edits on the **Summary** tab.

   **Note:** Campaign names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

4. When you have finished making your changes, click **Save and Finish**.

   Your changes are saved and the campaign closes.

## About running campaigns

You run a campaign by running one or more of the flowcharts in the campaign. Before you can run a flowchart, all of the processes in that flowchart must be correctly configured. Unconfigured flowchart processes appear in gray; successfully configured flowchart processes appear in color.

You can test run a flowchart to run it without writing output to system tables.

## To print a campaign

You can print any page in a campaign using the **Print this Item** icon.

1. Select the campaign tab you want to print.

   The selected tab opens.
2. Click the **Print this Item** icon.

   A new window opens displaying a printer-friendly version of the current page.
3. Click **Print**.

   The Print window appears, where you can set your printer options.
4. Click **Print** in the Print window.

   The page prints.

## To move a campaign

You can organize campaigns by moving them from folder to folder.

**Important:** If someone is editing a flowchart in the campaign you plan to move, that entire flowchart might be lost when you move the campaign. Make sure none of the flowcharts in the campaign are open for editing when you move the campaign.

1. On the Campaigns page, select the checkbox next to the campaign you want to move. You can select multiple campaigns to move to the same location at one time.
2. Click the **Move** icon.

   The Move Items To window appears.
3. Click the folder where you want to move the campaign.

   Navigate through the list by clicking the **+** sign next to a folder to open it.
4. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

The campaign is moved into the destination folder.

## About deleting campaigns

When you delete a campaign, the campaign and all flowchart files are deleted. If there are portions of your campaign you want to store for reuse, you can save them as a stored object. For more information, see Chapter 10, "Stored objects," on page 167.

**Important:** If you delete a campaign that has associated contact or response history records, all corresponding contact and response history records will be deleted. Do not delete the campaign if you need to retain the associated contact and response history.

### To delete a campaign

1. On the Campaigns page, navigate to the campaign you want to delete.
2. Select the checkbox next to the campaign you want to delete. You can select multiple campaigns to delete at one time.
3. Click the **Delete Selected** icon.

   **Important:** If you attempt to delete a campaign that has associated contact or response history records, a warning message indicates that all corresponding contact and response history records will be deleted. If you need to retain the corresponding contact and response history, click **Cancel**.
4. Click **OK** on the confirmation window.

The selected campaign is deleted.

**Note:** You can also delete a campaign while viewing the campaign by clicking the **Delete** icon.

## Analyzing campaign results

After running your campaign, you can measure the results and use these results to fine-tune your strategy. Campaign analyzes a variety of information about your campaigns, including actual response rates, revenue, and profit per responder. Based on this information, Campaign can calculate your total and incremental revenue and profit, as well as your overall ROI.

Campaign offers several types of reports to help you gather and analyze information about your campaigns. For information on working with reports, see Chapter 12, "Reports," on page 199.

## Organizing campaigns

You can organize your campaigns by creating a folder or series of folders. You can then move campaigns from one folder to another within the folder structure you have created. You can add, move, and delete folders to organize your campaigns. You can also edit a folder's name and description.

### To add a campaign folder

1. Select **Campaign > Campaigns**.
   The All Campaigns page appears, displaying the folders or campaigns in the current partition.
2. Navigate to the folder where you want to add a subfolder and click **Add a Subfolder**, or simply click **Add a Subfolder** to add a folder at the top level.
   The Add a Subfolder page appears.
3. Enter a name, the security policy, and description for the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215
4. Click **Save Changes**.

You are returned to the All Campaigns page. The new folder or subfolder you created is displayed.

## To edit a campaign folder's name and description

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition.
2. Click the folder you want to rename.
3. Click **Rename**.

   The Rename a Subfolder page appears.
4. Edit the name and description of the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215
5. Click **Save Changes**.

You are returned to the All Campaigns page. The folder or subfolder is renamed.

## To move a campaign folder

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition.
2. Navigate to the folder containing the subfolder you want to move.
3. Select the checkbox next to the folder you want to move. You can select multiple folders to move to the same location at one time.
4. Click the **Move** icon.

   The Move Items To window appears.
5. Click the folder where you want to move the subfolder.

   Navigate through the list by clicking the **+** sign next to a folder to open it.
6. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

The subfolder and all its contents are moved into the destination folder.

## To delete a campaign folder

You must move or delete the contents of a folder before you can delete it.

**Note:** If you have the permissions required to delete a folder, Campaign also allows you to delete any of the subfolders in that folder.

1. Select **Campaign > Campaigns**.

   The All Campaigns page appears, displaying the folders or campaigns in the current partition.
2. Navigate to the folder that contains the subfolder you want to delete.
3. Select the checkbox next to the folder you want to delete. You can select multiple folders to delete at one time.
4. Click **Delete Selected**.

5.  Click **OK** on the confirmation window.

The folder and all its empty subfolders are deleted.

## Campaigns reference

This section describes the fields and icons in the Campaign interface for working with campaigns.

## All Campaigns page icons

The All Campaigns page uses the following icons.
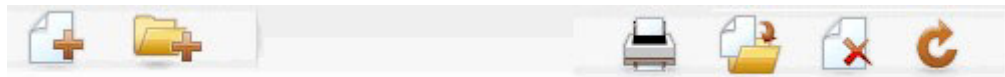


The icons, left to right, are described in the following table.

**Note:** Many of the icons in the Campaign interface are associated with features that require permissions. For more information, see the *Marketing Platform Administrator's Guide*.

*Table 1. Icons used on the All Campaigns page*

| Icon Name | Description |
|---|---|
| Add a Campaign | Click to add a new campaign. **Note:** This icon does not appear if the user does not have the appropriate permissions, or if Marketing Operations and Campaign integration is enabled. For information about creating campaign projects in Marketing Operations, see the *Marketing Operations andCampaign Integration Guide*. |
| Add a Subfolder | Click to add a new campaign subfolder. |
| Print this Item | Prints the page. |
| Move | Select one or more campaigns or campaign subfolders by clicking the checkbox next to each item, then click this icon to specify a new location to move the selected items. |
| Delete Selected | Select one or more campaigns or campaign subfolders by clicking the checkbox next to each item, then click this icon to delete the selected items. |
| Reload campaigns | Click this icon to refresh the list of campaigns on the page. |

## Campaign Summary tab icons

The Campaign Summary tab uses the following icons.



The icons, left to right, are described in the following table.

**Note:** Many of the icons in the interface are associated with features that require permissions. For more information, see the *Marketing Platform Administrator's Guide*. The following icons do not appear without the appropriate permissions: **Edit Summary**, **Add/Remove Segments**, **Add/Remove Offers**, **Add a Flowchart**, **Move this Campaign**, and **Delete this Campaign**.

*Table 2. Campaign Summary tab icons*

| Icon Name | Description |
|---|---|
| Edit Summary | Click this icon to edit the campaign summary. |
| Add/Remove Segments | Click this icon to change the strategic segments associated with this campaign. |
| Add/Remove Offers | Click this icon to change the offers associated with this campaign. |
| Run | Click this icon to access the **Run** menu, where you can select **Run All** to run all flowcharts in this campaign. |
| Add a Flowchart | Click this icon to add a flowchart to this campaign. |
| Print this Item | Click this icon to print the campaign summary. |
| Move this Campaign | Click this icon to specify a new location to move the campaign. |
| Delete this Campaign | Click this icon to delete the campaign. |

## Campaign Summary tab reference

The following table describes the fields on the Campaign Summary tab:

*Table 3. Campaign Summary tab fields*

| Field | Description |
|---|---|
| Security Policy | Security policy that applies to the campaign. |
| Description | Description of this campaign, displayed under the campaign name on the All Campaign pages. |
| Objective | Objective for this campaign. |
| Campaign Code | A unique identifier for the campaign, which follows a specified format. Campaign automatically generates a unique campaign code for each new campaign, following the default format or your organization's custom format. You can edit this code or click **Regenerate Code** to generate a new code. **Note:** If you edit the code, Campaign can no longer ensure the global uniqueness of campaign codes. If you are performing response tracking, try to avoid using editable codes (such as campaign codes) as tracking codes. Instead, use Campaign-generated treatment codes, which cannot be manually edited and are guaranteed to be unique. |
| Effective/Expiration Dates | Date range during which the campaign is effective. You can manually enter the date or click the calendar icon or the forward and back arrows to choose the date. |
| Initiative(s) | Initiative under which the campaign falls. The list of available initiatives is created by your system administrator. |
| Owner | This non-editable field displays the user name of the person who created this campaign. |

Any custom attributes that were created by your system administrator appear at
the bottom of the page.

# Chapter 5. Flowcharts

You use flowcharts to perform a sequence of actions on your data for executing your campaign logic. Campaigns are made up of one or more flowcharts. Flowcharts are made up of processes, which you configure to perform the data manipulation, contact list creation, or contact and response tracking required for your campaign. In effect, the processes are how you define and implement a campaign.

**Note:** Working with flowcharts requires the appropriate permissions. For information about permissions, see the *IBM Unica Campaign Administrator's Guide*.

## Creating flowcharts

You can add a new flowchart to your campaign either by creating a new one, or copying an existing one.

Copying an existing flowchart may save time because you can start with a completed flowchart and modify it to meet your needs.

To facilitate constructing flowcharts, you can use pre-configured flowchart templates to quickly create common campaign logic or process box sequences. You can also save and reuse other objects such as queries, table catalogs, triggers, custom macros, user variables, and definitions of derived fields.

### Flowchart design considerations

You should be aware of the following considerations when creating flowcharts.

- **Avoid cyclical dependencies.** Be careful not to create cyclical dependencies among your processes. For example, your flowchart has a Select process that provides input to a Create Seg process. If you choose as input in your Select process a segment that will be created by the same Create Seg process that the Select process provides output to, you will have created a cyclical dependency. This situation will result in an error when you try to run the process.
- **Applying global suppressions.** If your organization uses the global suppression feature, be aware that a particular set of IDs might be automatically excluded from use in target cells and campaigns.

### To create a new flowchart

**Note:** If you are creating an interactive flowchart, see the IBM Unica Interact documentation for information.

1. In the campaign or session to which you want to add a flowchart, click the **Add a Flowchart** icon.

   The Flowchart Properties page appears.
2. Enter a name and description for the flowchart.

   **Note:** Flowchart names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

**Note:** Under **Flowchart Type**, **Standard Batch Flowchart** is the only option unless you are a licensed user of Interact. If you have installed a licensed version of Interact, you can also select Interactive Flowchart.

3. Click **Save and Edit Flowchart**.

   The Flowchart page displays the process palette and a blank flowchart workspace.

4. Add processes to your flowchart.

   A flowchart typically begins with one or more Select or Audience processes to define the customers or other marketable entities with which to work.

   **Important:** Be sure to click **Save** frequently while adding and configuring the processes in your flowchart.

5. Click **Save** or **Save and Exit** when you have finished creating your flowchart.

## Copying flowcharts

Copying an existing flowchart to add to a campaign saves time because you can start with a completed flowchart and modify it to meet your needs.

If the copied flowchart includes contact processes (Mail List or Call List) with target cells linked to target cells defined in the target cell spreadsheet, new cell codes will be generated for cells in the new copy of the flowchart so that duplicate cell codes do not occur. If the target cells were defined "bottom up" that is, from the flowchart, and if the **Auto-generate cell code** option in the contact process is off, new cell codes are NOT generated when you paste the copied flowchart.

**Note:** When you copy an existing flowchart, if the flowchart logic uses derived fields that reference any cell codes from the old flowchart, the logic will be broken in the new flowchart.

Process configuration settings are copied to the new flowchart. However, any temp files or temp tables that were created as a result of running the original flowchart are not copied to the new flowchart.

### To copy a flowchart

1. View the flowchart you want to copy.

   For example, you can click the flowchart's tab while viewing its campaign.

2. Click the **Copy** icon.

   The Duplicate Flowchart window appears.

3. Select the campaign into which you want to copy the flowchart.

   Navigate through the list by clicking the + sign next to a folder to expand it.

4. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

The flowchart is moved to the campaign you selected.

# Viewing flowcharts

If you have View permissions for a flowchart, you can open it in Read-Only mode for viewing, which allows you to view the flowchart structure, but not to open process configuration dialogs or make any changes. In Read-Only mode, you can view the processes and connections between processes to quickly see the purpose of the flowchart.

When the flowchart is open for viewing, you can also zoom out to see more processes at once or zoom in to magnify a portion of the flowchart more closely.

To see more details of the flowchart, such as how the processes in the flowchart are configured, you must open the flowchart for reviewing or editing.

## To view a flowchart

You can view a flowchart in three ways:
* On the Campaigns page, click the **View a tab** icon next to the campaign and select the flowchart you want to view from the menu.
* Open the flowchart tab directly from the campaign.
* Open the campaign's Analysis tab, then click the flowchart name from the list of flowcharts.

**To zoom in and out**

Click the **Zoom In** and **Zoom Out** icons.

# Reviewing flowcharts

If you have Review permissions (and not Edit permissions) for flowcharts, you can open them only in Review mode, which allows you to view process configurations and modify the flowchart, but you cannot save any changes or perform production runs of flowcharts or any of their processes. This allows you to safely verify a flowchart's contents, or copy and reuse processes within a flowchart without fear of inadvertently changing the flowchart.

**Important:** Be aware that test runs can write output, and that test runs can execute triggers. In addition, even in Review mode, if you have the appropriate permissions, you can edit custom macros and triggers in the flowchart, and thus might change the flowchart.

Other actions you can perform in Review mode are:
* Test runs if you have the appropriate permissions.
* Save processes or the flowchart you are reviewing as a template.

**Important:** In Review mode, the flowchart auto-save option is disabled and cannot be enabled. To save changes to a flowchart, you must have Edit permissions.

## To review the processes in a flowchart

**Note:** You open a flowchart in Review mode in the same way as you open a flowchart in Edit mode. Your permissions settings automatically ensure that you can only access flowcharts in Review mode if you do not also have Edit permissions.

You can open a flowchart for reviewing in several ways:

- On the Campaigns page, click the **Edit a tab** icon next to the campaign and select the flowchart you want to review from the menu.
- Open the campaign, then click the flowchart tab. On the flowchart page, click the **Edit** icon.

  You can also press **Ctrl** and click the flowchart tab to open the flowchart directly in Review mode.

- Open the campaign's **Analysis** tab, click the link to the flowchart you want to review, then click the **Edit** icon.

  On the Analysis tab, you can also press **Ctrl** and click the flowchart link to open the flowchart directly in Review mode.

When you enter a flowchart in Review mode, you see a message indicating that the flowchart is in review mode and that any changes you make cannot be saved. The page header indicates "Reviewing", and only the **Cancel** option is visible.

## Editing flowcharts

You edit a flowchart to add or remove processes or to configure the processes. You can also edit the flowchart's name and description.

**Important:** If you try to edit a flowchart that is already being edited by someone else, Campaign warns you that the flowchart is open by another user. If you continue opening the flowchart, the other user's changes are immediately and permanently lost. To prevent the loss of work, do not continue opening the flowchart without first checking with the other user.

### To open a flowchart for editing

You can open a flowchart for editing in several ways:

- On the Campaigns page, click the **Edit a tab** icon next to the campaign, and select the flowchart from the menu.
- Open the campaign, then click the flowchart tab. On the flowchart page, click the **Edit** icon.

  You can also press **Ctrl** and click the flowchart tab to open the flowchart directly in **Edit** mode.

- Open the campaign's **Analysis** tab, click the link to the flowchart you want to edit, then click the **Edit** icon.

  You can also press **Ctrl** and click the flowchart name to open the flowchart directly in **Edit** mode.

### To edit a flowchart's properties

1. Open the flowchart for editing.
2. Click the **Properties** icon in the Flowchart toolbar.

   The Edit Flowchart Properties page appears.
3. Modify the flowchart name or description.

   **Note:** Flowchart names have specific character restrictions. See "Special characters in IBM Unica Campaign object names," on page 215.
4. Click **Save Changes**.

   The modified flowchart details are saved.

# Validating flowcharts

You can check the validity of a flowchart at any time (except when the flowchart is running) using the **Validate Flowchart** feature. You do not need to have saved a flowchart to run validation on it.

Validation performs the following checks for a flowchart:
- that the processes within the flowchart are configured.
- that cell codes are unique within the flowchart, only if the AllowDuplicateCellCodes configuration parameter is set to **No**. If this parameter is set to **Yes**, duplicate cell codes within flowcharts are allowed.
- that cell names are unique within the flowchart.
- that offers and offer lists referenced by contact processes are valid (that is, that they have not been retired or deleted). Offer lists that are referenced but are empty will not generate an error, only a warning.
- that any cells linked to a top-down entry from the target cell spreadsheet are still connected.

The validation tool reports the first error found in the flowchart. You might need to run the validation tool several times in succession (after correcting each displayed error) to ensure that you have fixed all found errors.

**Note:** A best practice is to run validation on flowcharts before executing production runs, particularly if you will be running flowcharts by batch mode or will not be actively monitoring the run.

## To validate a flowchart

1. On a flowchart page in **Edit** mode, click the **Run** icon and select **Validate Flowchart**.

   Campaign checks your flowchart.
2. If errors exist in the flowchart, a message box appears, displaying the first error found. As you correct each error and rerun the validation.tool, the remaining errors are displayed successively.

# Testing flowcharts

You can conduct a test run on a flowchart or branch if you do not want to output data or update any tables or files. However, note that triggers execute on completion of both test and production runs.

When testing processes, branches, or flowcharts, note that global suppression is applied.

**Note:** A best practice is to conduct test runs on processes and branches as you are building flowcharts, so that you can troubleshoot errors as they occur. Also, remember to save each flowchart before you run or test it.

## To test run a flowchart

1. On a flowchart page in **Edit** mode, click the **Run** icon and select **Test Run Flowchart**.

   The flowchart runs in test mode. Data is not written to any tables.

Each process displays a blue check mark when it has run successfully. If there are errors, the process displays a red "X".

2. Click **Save and Exit** to save the flowchart.

   You can also click **Save** to save the flowchart and leave it open for editing.

   If you click **Save and Exit** before the flowchart has finished running, the flowchart will continue running and save when it finishes. If you or another user reopen the flowchart while it is still running, any changes made to the flowchart are lost. For this reason, always save a flowchart before running it.

   To pause the run, right click the process box and select **Run > Pause**. To stop the run, right click the process box and select **Run > Stop**.

3. Click the **Analysis** tab on the Campaign toolbar and view the **Campaign Flowchart Status Summary** report to determine if there were any errors in the flowchart run.

## To test run a flowchart branch

1. On a flowchart page in **Edit** mode, click a process on the branch you want to test.

2. Click the **Run** icon and select **Test Run Selected Branch**.

The flowchart runs in test mode. Data is not written to any tables.

Each process displays a blue check mark when it has run successfully. If there are errors, the process displays a red "X".

# Running flowcharts

You can choose to run an entire flowchart, a branch, or an individual process in the flowchart. For best results, conduct test runs as you are building flowcharts, so that you can troubleshoot errors as they occur, and be sure to save each flowchart before you test or run it.

**Important:** For flowcharts containing contact processes, note that each production run of a flowchart can generate contact history only once. To generate multiple contacts from the same list of IDs, snapshot out the list of IDs and read from the list for each flowchart run.

**Note:** Users with Administrative privileges can access the Monitoring page, which displays all running flowcharts and their statuses, and provides controls to suspend, resume, or stop flowchart runs.

## To run a flowchart

1. If you are viewing a flowchart, you can run it by clicking the **Run** icon and selecting **Run This**.

   If you are editing a flowchart, click the **Run** icon and select **Save and Run Flowchart**.

2. If the flowchart has already been run, click **OK** on the confirmation window.

   Data from the run is saved to the appropriate system tables. Each process displays a blue check mark when it has run successfully. If there are errors, the process displays a red "X".

3. Click **Save and Exit** to save the flowchart.

   You can also click **Save** to save the flowchart and leave it open for editing.

You must save the flowchart once after running to view the results of the run in any reports. Once you have saved the flowchart, results of repeated runs are immediately available.

**Note:** If you click **Save and Exit** before the flowchart has finished running, the flowchart will continue running and save when it finishes.

4. Click the **Analysis** tab on the Campaign toolbar and view the **Campaign Flowchart Status Summary** report to determine if there were any errors in the flowchart run.

## To run a flowchart branch

1. On a flowchart page in **Edit** mode, click a process on the branch you want to run.
2. Click the **Run** icon and select **Save and Run Selected Branch**.

**Note:** Running only a process or a branch of a flowchart does not increment the Run ID of a flowchart. When you run only a process or a branch, if contact history records exist, you are prompted to choose run history options before you can proceed. For details, see "About run history options" on page 30.

Each process displays a blue check mark when it has run successfully. If there are errors, the process displays a red **X**.

## To run a process

To make sure that your configuration is successful and that the results are what you expect, be sure to run each process as soon as you configure and connect.

**Note:** When you run a process, any results from a previous run are lost.

1. Within a campaign, open a flowchart for editing.
2. Click the process that you want to run.

   If the process requires data from a source process, be sure that the source process has already run successfully so that its data is available.
3. Click the **Run** icon or right-click a process box, then select one of the following options:
   - **Test Run Selected Process**: Use this option when building your flowchart, so you can troubleshoot errors as they occur. Test runs do not output data or update any tables or files. (However, triggers run on completion of test runs, and global suppression is applied.)
   - **Save and Run Selected Process**: Do a production run. Processes such as Mail List and Call List will write entries into Contact History. Each production run can generate contact history only once. Contact processes that have already executed for that production run can be re-run only if the contact history from the current run is first deleted. Triggers run on completion of the production run.

   **Note:** Running only a process or a branch of a flowchart does not increment the Run ID of a flowchart. When you run only a process or a branch, if contact history records exist, you are prompted to choose run history options before you can proceed. For details, see "About run history options" on page 30.
4. When the process finishes running, click **OK** on the confirmation window.

The process displays a blue checkmark when it has run successfully. If there are errors, the process displays a red "X."

# About run history options

**Note:** You see the Run History Options window only when you run a branch or process that has already generated contact history for the current Run ID. If a new run instance does not exist for a particular re-run branch or process, the Run History Options window does not appear.

Use the Run History Options window to choose how the new contact history you generate is written to the contact history table.

## Run history options scenario

You have a flowchart with two branches and two contact processes, A and B, both configured to log to contact history.

You run the entire flowchart (from the top, using the Run Flowchart command) once. This creates a new Run ID (for example, Run ID = 1) and generates contact history for this Run ID.

After this first successful run of the entire flowchart, you edit contact process A to give a follow-up offer to the same individuals who received the first offer. Therefore, you want to rerun contact process A. The current Run ID is "1" and contact history already exists for process A and Run ID=1.

When you select contact process A and click "Run Process," you see the Run History Options window. You can choose to leave the Run ID unchanged (Run ID=1) and replace the existing contact history associated with this Run ID, or you can create a new run instance (that is, increment the Run ID to 2), leave the contact history associated with Run ID=1 untouched and append new contact history associated with Run ID=2.

You are sending a follow-up offer and do not want to lose the contact history associated with the first offer, so you choose **Create a new run instance**. This changes the Run ID to "2" and appends contact history records for the same IDs who received the first offer to the contact history table.

If you now edit and run contact process B, you will not see a Run History Options window, because the current Run ID = 2 and contact history associated with Run ID =2 does not exist for contact process B. Running only contact process B will simply generate additional contact history records for Run ID = 2.

## Run History Options window reference

The Run History Options window contains the following options.

*Table 4. Run History Options window options*

| Option | Description |
|---|---|
| Create a new run instance | Rerun a specific branch or process of the flowchart using a new Run ID. Append the results, associated with the new Run ID, to the contact history table. Existing contact history remains intact. |
| Replace the contact history of the previous run | Reuse the previous Run ID and replace the contact history previously generated for that Run ID (only for the process or branch that is being run). Contact history records that were previously generated for other branches or processes of the flowchart remain intact. |

*Table 4. Run History Options window options  (continued)*

| Option | Description |
|--------|-------------|
| Cancel | Cancel the branch or process run and do nothing to existing contact history. The flowchart remains open in Edit mode. |

You cannot replace contact history if associated response history exists. Therefore, if you selected **Replace the contact history of the previous run** and associated response history records exist, you can choose one of two options:

- Click **OK** to clear the associated response history records as well as the contact history records. This is your only option if response history exists and you want to replace the contact history from the previous run.
- Click **Cancel** to cancel clearing the contact history records. You can choose **Create a new run instance** instead, to create a new run instance to run the current contact process.

## To pause a flowchart run

When you pause a running flowchart, branch, or process, the server stops running, but saves all the data already processed. You might want to pause a run to free up computing resources on the server.

After pausing a run, you can continue the run or stop it.

On a flowchart page, click the **Run** icon and select **Pause This**.

**Note:** If you have the appropriate permissions, you can also control flowcharts from the Monitoring page.

## To continue a paused flowchart run

When you continue running a paused run, the run resumes at the exact point at which it stopped. For example, if a Select process were paused after processing 10 records, it would resume running by processing the 11th record.

On a flowchart page, click the **Run** icon and select **Continue This**.

**Note:** If you have the appropriate permissions, you can also control flowcharts from the Monitoring page. For details, see the *Campaign Administrator's Guide*.

## To stop a flowchart run

On a flowchart page, click the **Run icon** and select **Stop This**.

The results of any currently running processes are lost and a red **X** appears on those processes.

**Note:** If you have the appropriate permissions, you can also control flowcharts from the Monitoring page.

## To continue a stopped flowchart run

You can continue running a stopped flowchart by running the flowchart branch that begins with the process where the flowchart stopped. That process will be rerun along with all downstream processes.

1. On a flowchart page in **Edit** mode, click the process that displays a red **X**.
2. Click the **Run** icon and select **Save and Run Selected Branch**.

   **Note:** If you have the appropriate permissions, you can also control flowcharts from the Monitoring page. For details, see the *Campaign Administrator's Guide*.

## Troubleshooting runtime errors

Correctly configured processes are displayed in color (the specific color reflects the type of process). A gray process with its name in italics has a configuration error. To find out more information about the error, hold your mouse over the process to display a descriptive error message.

If a flowchart stops running due to an error, the processes that were running display a red **X.** Hold your mouse over the process to see an error message.

**Note:** If Campaign is configured so that system tables are stored in a database, you are not viewing the flowchart, and the run stops due to a database connection failure, the processes will not display a red **X**. Instead, the flowchart appears as it did when it was last saved.

You should also consult the log file for system error information and review the Analysis and Performance/Profitability reports for the campaign to see that the results are what you expected.

## Deleting flowcharts

Deleting a flowchart permanently removes a flowchart and all of its associated files, including the log file. If there are portions of your flowchart that you want to store for reuse, you can save them as a stored object.

Output files (such as those written by a Snapshot, Optimize, or a contact process) are not deleted, and contact and response history information is retained.

**Important:** If you try to delete a flowchart that is being edited by someone else, Campaign warns you that the flowchart is open by another user. If you continue deleting the flowchart, the other user's changes will be permanently lost. To prevent the loss of work, do not continue deleting the flowchart without first checking with the other user.

### To delete a flowchart

1. Open the flowchart you want to delete in **View** mode.
   The flowchart tab appears.
2. Click the **Delete Flowchart** icon.
3. Click **OK** on the confirmation window.
   The flowchart and all its associated files are removed.

# To print a flowchart

You can print hardcopies of flowcharts from Campaign.

**Note:** Do not use your Web browser's **File > Print** command, as flowcharts might not print correctly.

1. Open the flowchart that you want to print, in either **View** or **Edit** mode.
2. Click the **Print** icon.

   You see the Page Setup window.
3. Click **OK**.

   You see the Print window.
4. Click **OK** to print the current flowchart.

   You see a Campaign window indicating that the flowchart is printing.

# Packaging flowchart files for troubleshooting

If you need help from IBM to troubleshoot a flowchart, you can automatically collect relevant data to send to IBM Technical Support. You can select from a list of items to include, and specify date ranges by which to limit data. The data is written to the folder you choose, and the contents can be compressed and sent to IBM Technical Support.

In addition to the data items you select, Campaign also creates a summary file that identifies:

- Current date and time
- Version and build numbers of the software
- Your user name
- The selections you included in the package

## To package flowchart files for troubleshooting

Only a user with permissions to edit or run a flowchart (either test or production run) can perform this procedure. If you do not have "View logs" permission, you cannot select the log-related entries in the selection window.

Use this task to automatically package flowchart data files so you can send them to IBM Technical Support if you need help troubleshooting a flowchart.

1. From a flowchart page in **Edit** mode, select **Admin** > **Collect Flowchart Data**.
   You see the Create Data Package for Troubleshooting window.
2. Type a name for the package, or leave the default name. The package name will be used to create a subfolder in which the selected data items will be written.
3. Click **Browse** and select the folder under which the data package will be saved.
4. Select the check box for each item you want to include in the package. Some items, when selected, may allow additional information to be entered with which to filter the extracted data.

   Alternatively, you can check the **Select default items** check box. This check box automatically selects all data commonly required for troubleshooting flowcharts; this includes all of the listed items except the log files and the contents of the user table, contact and response history tables, strategic segments, and stack trace files.

5. Click **OK** to create the package.

# Transmitting the flowchart data package to IBM Unica Technical Support

You can send the data package to IBM Unica Technical Support by email or using a method recommended by your support representative. IBM Unica Technical Support will accept uncompressed data (the entire package subdirectory), but you may optionally compress, encrypt, and package the files into a single file before sending them to IBM.

# Options for packaging flowchart data

*Table 5. Options for packaging flowchart data*

| Item | Description of what is included | Additional specifications you may set |
|---|---|---|
| **Select Default Items** check box | All data commonly required for troubleshooting flowcharts. This includes all of the listed items except the log files and the contents of the user table and contact history table. | |
| **Flowchart** | The flowchart `.ses` file. | **Include run results?** Optionally include or exclude the runtime data files, also called the "underscore" files. |
| **Flowchart Log** | The flowchart `.log` file. | Optionally set start and end time stamps. If you do not set them, the default is the entire log file. |
| **Listener Log** | The `unica_aclsnr.log` file. | Optionally set start and end time stamps. If you do not set them, the default is the entire log file. |
| **Startup Log** | The `AC_sess.log` file. | Optionally set start and end time stamps. If you do not set them, the default is the entire log file. |
| **Web Message Log** | The `AC_web.log` file. | Optionally set start and end time stamps. If you do not set them, the default is the entire log file. |
| **Campaign Configuration** | The `.config` file, which lists configuration properties and settings from your Campaign environment to assist in troubleshooting the flowchart. | |
| **Campaign Custom Attributes** | The `customcampaignattributes.dat` file, which lists attribute name and value pairs for Campaign custom attributes. Only entries related to the current campaign are included. | |
| **Cell Custom Attributes** | The `customcellattributes.dat` file, which lists attribute name and value pairs for Campaign cell custom attributes. Only entries related to the current campaign are included. | |

*Table 5. Options for packaging flowchart data  (continued)*

| Item | Description of what is included | Additional specifications you may set |
|---|---|---|
| **Offer Definitions** | All rows are included for each of the following offer-related system tables:UA_AttributeDef.dat, UA_Folder.dat, UA_Offer.dat, UA_OfferAttribute.dat, UA_OfferList.dat, UA_OfferListMember.dat, UA_OfferTemplate.dat, UA_OfferTemplAttr.dat, UA_OfferToProduct.dat, UA_Product.dat, UA_ProductIndex.dat | |
| **Target Cell Spreadsheet Data** | The targetcellspreadsheet.dat file, which includes data from UA_TargetCells for the entire Target Cell Spreadsheet. Includes data for the current campaign, in column/row-delimited text format. | |
| **Custom Macro Definitions** | The custommacros.dat file, which includes the following fields from UA_CustomMacros, in column/row format: Name, FolderID, Description, Expression, ExpressionType, DataScrName, DataVarType, DataVarNBytes, CreateDate, CreatedBy, UpdateDate, UPdateBy, PolicyIS, ACLID | |
| **System Table Mapping** | The systablemapping.xml file. Includes all system table mappings, including the data source. | |
| **+ Include System Table Contents** | When you select this option, it expands to list all system tables. | Select each system table to include. The entire table will be included (all rows and all columns). If you do not select any sub-options, the package will not include any system tables. |
| **+ Include Contact History Tables** | When you select this option, it expands to show the contact history and detailed contact history tables for each audience level. | For each set you select, the package will include the contact history and detailed contact history records for that audience level. You can optionally set start and end time stamps. If you do not set them, the default is all records. If you do not select a suboption, the package will not contain any contact history table information. |

*Table 5. Options for packaging flowchart data  (continued)*

| Item | Description of what is included | Additional specifications you may set |
|------|-------------------------------|---------------------------------------|
| **+ Include Response History Tables** | When you select this option, it expands to show response history tables for all audience levels. | For each table you select, the package will include the response history records for that audience level.<br><br>For each table you select, you can optionally set start and end time stamps. If you do not set them, the default is all records.<br><br>If you do not select a table, the package will not contain any response history table information. |
| **+ Include User Table Contents** | When you select this option, it expands to show the user table contents that you can select for the package. | Select the user tables from the flow chart to include.<br><br>If you do not select any, the package will not include any user table contents.<br><br>For each user table that you select, you can optionally set maximum number of rows to include. If you do not set a maximum number of rows, the package will include the entire table. |
| **+ Include Strategic Segments** | When you select this option, it expands to show all the strategic segments that you can select for the package. | |
| **+ Include Stack Trace Files** | Option available for Unix versions only. When you select this option, it expands to show the list of stack trace files (`*.stack`) in the same directory as `unica_aclsnr.log`. | Select the stack trace files that you want to include in the package. If you do not select any suboptions, the package will not include any stack trace files. |

# Flowchart reference

This section describes the icons in the Campaign interface for working with flowcharts.

## Flowchart tab icons (View mode)

The flowchart tab uses the following icons in **View** mode.



The icons, left to right, are described in the following table.

**Note:** Many of the icons in the interface are associated with features that require permissions. For more information, see the *Marketing Platform Administrator's Guide*. The **Copy** and **Delete Flowchart** icons do not appear without the appropriate permissions:

*Table 6. Flowchart tab icons for View mode*

| Icon Name | Description |
| --- | --- |
| Edit | Click this icon to edit the flowchart. |
| Run | Click this icon to access the **Run** menu. |
| Add a flowchart | Click this icon to add another flowchart to the campaign. |
| Zoom In | Click this icon to increase the view size of the flowchart. |
| Zoom Out | Click this icon to decrease the view size of the flowchart. |
| Print this Item | Click this icon to print the flowchart. |
| Copy | Click this icon to create a copy of this flowchart. |
| Delete Flowchart | Click this icon to delete the flowchart. |

## Flowchart page icons (Edit mode)

The Flowchart page uses the following icons in **Edit** mode.



The icons, left to right, are described in the following table.

**Note:** Many of the icons in the interface are associated with features that require permissions. For more information, see the *Marketing Platform Administrator's Guide*.

*Table 7. Flowchart page icons for View mode*

| Icon Name | Description |
| --- | --- |
| Run | Click this icon to access the **Run** menu. |
| Properties | Click this icon to view or edit the Flowchart Properties window. |
| Options | Click this icon to access the **Options** menu. |
| Admin | Click this icon to access the Admin menu. |
| Reports | Click this icon to access the flowchart cell reports. |
| Cut | Select one or more items in the flowchart and click this icon to remove them. |
| Copy | Select one or more items in the flowchart and click this icon to copy them. |
| Paste | Click this icon to paste into the flowchart any items you have cut or copied. |
| Zoom In | Click this icon to increase the view size of the flowchart. |
| Zoom Out | Click this icon to decrease the view size of the flowchart. |
| Print | Click this icon to print the flowchart. |

# Chapter 6. Processes

Processes are the building blocks of flowcharts, which you configure to perform particular tasks to achieve the outputs you want. For example, you use the Merge process to merge two distinct audience groups, or use the contact processes (Call List or Mail List) to write out the results of an entire campaign.

Tasks are usually accomplished using processes that work with *cells*. Cells are lists of identifiers of marketing message recipients (such as customer or prospect IDs). Generally, each process in a flowchart takes one or more cells as input, transforms the data, and produces one or more cells as output.

The processes available to you in Campaign are visible on the flowchart process palette—the space that you use for creating a flowchart and working with processes.

The different types of processes are distinguished by color: data manipulation processes are shown in blue, run processes in red, and optimization processes in green.

To create a flowchart, you move processes of the required type from the process palette to the flowchart workspace, and connect and configure them.

## Types of processes

Campaign processes are divided into three types by function, which are distinguished by color in the flowchart process palette:

- Data manipulation processes - blue.
- Run processes - red.
- Optimization processes - green.

A specialized set of run processes called "contact processes" generates contact lists (Mail List or Call List).

**Note:** In addition to the Campaign processes described in this section, Interact, Optimize, and eMessage provide additional processes for use in campaign flowcharts. See the documentation for these products for information about the processes that they provide.

## Data manipulation processes

You use data manipulation processes to select customer IDs from your data source and work with those IDs in various ways to create meaningful groups or target audiences.

Data manipulation processes allow you to perform tasks such as selecting customers based on a set of criteria, merging lists of customers together for inclusion or exclusion, segmenting customers into meaningful groups, sampling for test or control groups, or specifying target audiences for your campaign.

The data manipulation processes are:
- "Select" on page 40

- "Merge" on page 41
- "Segment" on page 42
- "Sample" on page 47
- "Audience" on page 50
- "Extract" on page 59

# Select

Use the Select process to define the criteria to build lists of contacts, such as customers, accounts, or households, from your marketing data. Select is the most frequently used process in Campaign. Most flowcharts begin with one or more Select processes. The Select process outputs a cell containing a list of IDs, such as customer IDs, which can be modified and refined by other processes.

## To configure a Select process

Define a Select process to build a list of contacts from your marketing data. You can specify all IDs in a segment or table or you can use a query to select specific IDs.

1. Within a campaign, open a flowchart for editing.
2. Click the Select process in the palette, then click the workspace to add the process to your flowchart.

   The Select process box in the work area is gray until it has been configured.
3. Double-click the Select process in the flowchart workspace.

   The process configuration dialog appears.
4. On the Source tab, use the Input drop-down list to select a data source for the process.
5. Choose one of the following options:
   - **Select All IDs** to include all the rows from the data source selected in the **Input** list.
   - **Select IDs With** to filter the rows by creating a query that will select only certain IDs based on criteria you define.

   **Note:** The option names are based on the audience level of your input data source. For example, if your audience level is "Customer," then the options are **Select All Customer IDs** and **Select Customer IDs With**. If your audience level is "Household," then the options are **Select All Household IDs** and **Select Household IDs With**.
6. If you chose **Select IDs With**, create a query using one of the following methods:
   - **Point & Click**: This is the default view. Click in the **Field Name**, **Oper.**, **Value**, and **And/Or** column cells to select values from the list at the right side of the dialog, to build your query. This method is the easiest way to create a query, and it helps avoid syntax errors.
   - **Text Builder**: Click this button to write raw SQL or use the **Query Helper** to select from a wide variety of IBM Unica macros, such as logical operators and string functions.
7. If you are constructing a query, select the fields you want to include in your query from the Available Fields list, including IBM Unica Campaign Generated Fields and Derived Fields. For more information, see "Creating queries in processes" on page 93. Use **Check Syntax** and **Test Query** to ensure that your query does not have errors.

**Note:** If your query includes a table field that has the same name as a Campaign Generated Field, you must qualify the field name using the following syntax: `<table_name>.<field_name>` This syntax indicates that the table field will be used instead of the Campaign Generated Field.

8. Click the **Cell Size Limit** tab if you want to limit the number of IDs generated by the process.

9. Click the **General** tab to specify the **Process Name** (for example, New Customers), the **Output Cell** name (by default, this matches the Process Name), and the **Cell Code** (generally, just accept the default). Enter a **Note** to describe what this Select process is intended to achieve.

10. Click **OK**.

The process is configured and is enabled in the flowchart. You can test run the process to verify that it returns the results you expect.

## Merge

Use the Merge process to specify which input cells are included and combined, and which are excluded (suppressed). This allows you to include or exclude cells from subsequent processes in your flowchart. For example, use the Merge process to suppress "opt-out" customers who have requested that they not receive any marketing materials.

### To configure a Merge process

The Merge process accepts one or more input cells and produces one output cell. You specify which input cells are included and combined or excluded from the output.

1. Within a campaign, open a flowchart for editing.

2. Click the Merge process in the palette, then click the workspace to add the process to your flowchart.

3. Ensure that the Merge process is connected to one or more configured processes whose output cells will be used as input by the Merge process.

   **Note:** All input cells should have the same audience level.

4. Double-click the Merge process in the flowchart workspace.

   The process configuration dialog appears. Cells from processes connected to the Merge process are automatically displayed in the **Input** list.

5. On the **Method** tab, specify the input cells that you want to include or exclude. Click each cell in the **Input** list, and use the appropriate **Add>>** button to add it to the **Records to Include** list or the **Records to Exclude** list.

   The IDs in the cells in the **Records to Include** list will be combined into one list of unique IDs. IDs in the **Records to Exclude** list will not appear in the merged output.

6. Specify how you want to handle duplicate IDs in the input cells (specified in the **Records to Include** list) by selecting one of the following:

   - **Merge/Purge on Include**: Remove duplicate IDs to produce a list of unique IDs that appear in at least one input cell. This is a logical "OR" or "ANY."

   - **Match (AND) on Include**: Include only those IDs that appear across all input cells. This is a logical "AND" or "ALL."

   The first option will include customer A if that customer is in *either* the **Gold.out** cell OR the **Platinum.out** cell (but the record will only be included once, so you will not have duplicates). The second option will include customer A only if that customer appears in *both* the **Gold.out** cell AND the

**Platinum.out** cell,. The second option is useful when you want to include customers only if they meet multiple criteria.

7. Click the **Cell Size Limit** tab if you want to limit the number of IDs generated by the process.

8. Click the **General** tab to assign a **Process Name**, **Output Cell** name, and **Cell Code**, and enter a **Note** that describes the process.

9. Click **OK**.

The process is configured and enabled in the flowchart. You can test run the process to verify that it returns the results you expect.

## Segment

Use the Segment process to divide data into distinct groups (segments) to receive different treatments or offers. After the segments have been created, you connect the Segment process to a contact process (such as CallList or MailList) to assign treatments or offers to the segments. There is no limit to the number of segments you can create.

For example, you might want to divide your customers into high-value, medium-value, and low-value segments based on their prior purchase history. Each of these segments can then receive a different offer when connected to a contact process.

You can segment data in two ways: by using the distinct values in a field, or by filtering the data in a field using a query. In addition to database table fields, you can use derived fields to segment data. This allows you to perform custom binning.

**Important:** The segments created by the Segment process are not the same as the globally persistent strategic segments created by the Create Seg process, which can be used in any session or campaign.

### Segmenting by field

When you segment data by a field in a database table, each distinct value in the field creates a separate segment. This option is most useful when the values in the field correspond to the segments you want to create.

For example, assume that you want to assign a different offer to customers in each of 10 regions. Your customer database contains a field called `regionID`, which indicates the region to which each customer belongs. Segment by the `regionID` field to create the 10 regional segments.

### Segmenting by query

The segment by query option segments your data based on the results of a query that you create. This option is most useful when it is necessary to filter the data in a field to create the required segments.

For example, assume that you want to divide your customers into high-value (more than $500), medium-value ($250-$500), and low-value (under $250) segments based on their purchase history over the last year. The `PurchaseHistory` field in your customer database stores the total dollar amount of each customer's purchases. Use a separate query to create each segment, selecting records with values in the `PurchaseHistory` field that meet the criteria of the segment.

**Note:** You can also segment data using raw SQL.

## Using segments as input to another Segment process

Segments can also be used as input cells to another Segment process. For example, assume that you want to segment your customers into six age ranges. Your database contains a field called `AgeRange` that assigns one of six age ranges to each customer. Segment by the `AgeRange` field to create the six segments.

You could then use these six segments as input to another Segment process that further divides customers by another field or query. For example, assume that your database contains a field called `PreferredChannel`, which specifies each customer's preferred contact channel — direct mail, telemarketing, fax, or email. Using the six age range segments as input, you could then create a second Segment process to segment by the `PreferredChannel` field. Each of the six age range segments is further segmented into four preferred channel segments, to produce a total of 24 output segments.

## Segmenting considerations

Consider the following options and guidelines when segmenting data:

- "Choosing a segmenting method"
- "Making segments mutually exclusive"
- "Restricting segment size"
- "Selecting source cells"

**Choosing a segmenting method:** In some cases, the same results can be achieved when segmenting either by field or by query. For example, assume that the `AcctType` field in your database divides your customer accounts into Standard, Preferred and Premier levels. Segmenting by the `AcctType` field will create three segments for these account types. You could achieve the same results using queries, but creating the segments would require writing three separate queries. Determine the most efficient method based upon the data you are segmenting.

**Making segments mutually exclusive:** You can specify segments to be mutually exclusive, meaning that each qualifying record is guaranteed to be placed into no more than one segment. When the segments are assigned to offers, this will ensure that each customer receives only one offer.

Records are placed in the first segment whose criteria they satisfy, based on a priority order that you define. For example, if a customer qualifies for segments 1 and 3, and segment 1 is before segment 3 in the priority order, that customer will appear only in segment 1.

**Restricting segment size:** The default size for the number of records per segment is Unlimited. You may want to restrict the size of the created segment if, for example, you are performing test runs of the flowchart or process.

You can limit the segment size to any positive integer. If the segment size you specify is less than the total number of records generated, the segment will consist of randomly selected qualifying records.

**Selecting source cells:** All selected cells must be defined at the same audience level. If more than one source cell is selected, the same segmentation is performed on each source cell.

## To configure a Segment process by field

1. On the **Segment** tab of the **Segment Process Configuration** window, specify the input to the process, using the **Input** drop-down list. To use more than one source cell, click the **Multiple Cells** button and select the cells from the dialog box.

2. Select **Segment by Field** and use the drop-down list to select the field you want to use to create the segments.

   The **Profile Selected Field** window opens, and profiling of the selected field automatically starts.

3. Wait for profiling to finish before clicking **OK**, to ensure that all segments are properly created.

   The list of segments and the **# of Segments** field are updated based on the profiling results of the selected field. To reprofile the field at any time after initially selecting it, click **Profile**.

4. Set the remaining configuration options, if desired.

5. Click **OK**.

   The process is configured and appears enabled in the flowchart.You can test the process to verify that it returns the results you expect.

## To configure a Segment process by query

1. On the **Segment** tab of the **Segment Process Configuration** window, specify the input to the process, using the **Input** drop-down list. To use more than one source cell, click the **Multiple Cells** button and select the cells from the dialog box.

2. Select **Segment by Query**.

3. Determine the number of segments that you want to create, and enter that number in the **# of Segments** field.

4. To construct a query for each segment, select the segment and click **Edit** to access the Edit Segment window. For details, see "New Segment and Edit Segment dialogs" on page 47.

5. Set the remaining configuration options, if desired.

6. Click **OK**.

   The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Segment Process Configuration: Segment tab

The following table describes the fields, buttons, and controls on the Segment tab of the **Segment Process Configuration** window.

*Table 8. Segment tab*

| Field/control | Description |
|---|---|
| Input | Specifies the input to the Segment process. The drop-down list contains all output cells from any process connected to the Segment process. |
| Multiple Cells button | Allows you to choose more than one source cell as input to the Segment process. |
| Segment by field | Specifies a field to use for segmenting data. The data is segmented using the distinct values that exist for the selected field. Each distinct value in the field will create a separate segment. |

*Table 8. Segment tab  (continued)*

| Field/control | Description |
|---|---|
| Profile button | Opens the **Profile Selected Field** window, which calculates the values and distributions of records in the selected field. Active only when segmenting by field. |
| Derived Fields button | Opens the **Create Derived Field** window. Active only when segmenting by field. |
| Segment by query | Segments data based on a query that you create. |
| # of Segments | Specifies the number of segments to create. Active only when segmenting by query. By default, three segments are created, with default names "Segment1," "Segment2," and "Segment3." <br><br> When segmenting by field: The **# of Segments** field is updated based on the profiling results of the selected field. |
| Mututally Exclusive Segments | Specifies whether the segment is to be mutually exclusive (that is, each qualifying record is guaranteed to fall into no more than one segment). |
| Create Extract tables | Indicates whether the segment should create Extract tables for each output cell. Selecting this option ensures that Campaign can provide a later process with the information necessary to keep track of duplicate target audiences across segments. <br><br> Selecting this check box enables the options on the Extract tab. <br><br> This check box is disabled if **Mutually Exclusive Segments** is selected. |
| Segment Name | Lists all segments by name. By default, three segments are created, with default names "Segment1," "Segment2," and "Segment3." <br><br> When segmenting by field: Segment names are updated based on the profiling results of the selected field. For example, if you are segmenting on a field called "Acct_Status" which has two distinct values "A" and "B", two segments are created, named "Acct_Status_A" and "Acct_Status_B." |
| Max. Size | Maximum number of records allowed in each segment. |
| Size | Number of records that meet the criteria for the segment. Before the process is run, this number defaults to the total number of records in the output cell. |
| Query | Query that defines the criteria for this segment. Appears only when segmenting by query. |
| Up 1 | Move the selected segment one position higher in the processing order. Segments are processed in the order listed in the table. |
| Down 1 | Move the selected segment one position lower in the processing order. Segments are processed in the order listed in the table. |
| New Segment button | Opens the **New Segment** window. Active only when segmenting by query. |

*Table 8. Segment tab  (continued)*

| Field/control | Description |
|---|---|
| Edit button | Opens the **Edit Segment** window for editing the selected segment. |
| Remove | Removes the selected segment. When a segment is removed, the **# of Segments** field updates automatically. |
| Do Not Run Subsequent Processes For Empty Segments | Prevents processes downstream from this process from running for empty segments. |

## Segment Process Configuration: Extract tab

Use the Extract tab of the Segment Process Configuration window to allow the output you specify from the Segment process to be accessible as input to Mail List or Call List processes in the flowchart. The following table describes the fields, buttons, and controls on the Extract tab.

*Table 9. Extract tab*

| Field | Description |
|---|---|
| Target Data Source | Location to which the output from this process will be written. The Campaign Server and any other data sources to which you are connected are available from the **Target Data Source** drop-down list. |
| Candidate Fields | List of fields available to extract, including field name and data type, based on your input data source.<br><br>If your input source is a landing page in eMessage, each field name is an attribute of the landing page. If the attribute contains special characters or spaces, it is converted to a valid field name. Data types of all landing page attributes are listed as text.<br>**Note:** Schema object names are limited to 30 characters. Restrict your attribute names to 30 characters or less to produce valid column names for extracted output. |
| Fields to Extract | Fields you selected to extract from the Candidate Fields list. The Output Name defaults to the field name in the Fields to Extract column. |
| Profile button | Opens the Profile Selected Field window, which calculates the values and distributions of records in the selected field. Active only when a field name is selected in the **Candidate Fields** list. |
| Derived Fields button | Opens the Create Derived Field window. |
| More button | Opens the Advanced Settings window, which includes the option to skip duplicate records and to specify howCampaign identifies duplicates. |

## Segment Process Configuration: General tab

The Segment Process Configuration General tab allows you to modify the **Process Name**, **Output Cell** names, or **Cell Codes**, or enter a **Note** about the process. For details about these options, see these topics:

- "Changing the cell name" on page 135

### New Segment and Edit Segment dialogs

The following table describes the fields, buttons, and controls on the **New Segment** and **Edit Segment** dialogs.

**Note:** The **New Segment** dialog can be accessed only when you are segmenting by query. When you segment by field, only the **Name** and **Max. Size** fields can be accessed on the **Edit Segment** dialog.

*Table 10. New Segment and Edit Segment dialog controls*

| Field/control | Description |
|---|---|
| Name | Name of the segment. |
| Max. Size | Maximum number of records allowed in the segment. |
| Select Based On | Specifies a data source on which to base your query. |
| Select All <audience_level> IDs | Includes all the IDs from the data source in the Input drop-down list. The <audience_level> is the name of the audience level of the source cell. |
| Select <audience_level> IDs With | Provides access to the functions for creating a query to select only certain IDs based on criteria you define. The <audience_level> is the name of the audience level of the source cell. |
| Advanced button | Opens the Advanced tab, which provides the following options:<br>• Use Raw SQL: Use a raw SQL query to segment data.<br>• Use Query Scope from Input Cell: Available only if a source cell to this Segment process uses a query. Select the check box to have the source cell's query combined (using "AND") with the current selection criteria. |
| Derived Fields button | Opens the Create Derived Field window. |
| Query text box and buttons | For information about using the query text box and related fields and buttons, see "Creating queries in processes" on page 93. |

## Sample

Use the Sample process to create one or more cells for different treatments, control groups, or a subset of data for modeling. A wide variety of configurations is available for sampling.

### To configure a Sample process
1. In a flowchart in **Edit** mode, ensure that one or more configured processes (such as a Select process) are connected as input to the Sample process box.
2. Double-click the Sample process in the flowchart workspace.

   The process configuration dialog appears.
3. Use the **Input** drop-down list to select the cells that you want to sample. The list includes all output cells from any process connected to the Sample process. To use more than one source cell, select the **Multiple Cells** option. If more than one source cell is selected, the *same* sampling is performed on *each* source cell.

**Note:** All selected cells must be defined at the same audience level.

4. Use the **# of Samples/Output Cells** field to specify how many samples to create for each input cell. By default, three samples are created for each input cell, with default names "Sample1", "Sample2" and "Sample3."

5. To change the default sample names, select a sample in the **Output Name** column, then type a new name in the **Cell Name** box in the **Edit Output Cell** section. You can use any combination of letters, numbers, and spaces. Do not use periods (.) or slashes (/ or \).

   **Important:** If you change the name of a sample, you must update all subsequent processes that use this sample as an input cell. Changing a sample name might unconfigure subsequent connected processes. In general, you should edit the names of samples before connecting subsequent processes.

6. Specify the size of your samples using one of the following methods:
   - **Specify Size by %**: After selecting this option, use the **%** (percentage) field in the **Edit Output Cell** section to specify the percentage of records to use for the sample selected in the Output Name column. Use the **Max # Records** field if you want to limit the size of the sample. The default is **Unlimited**. After changing any values, click in any other field to see the change in the list of Output Names. Select another sample in the Output Name column and adjust the percentage for it, or use the **All Remaining** check box to assign all remaining records to that sample. You can only select **All Remaining** for one output cell.
   - **Specify Size By # Records**: After selecting this option, use the **Max # Records** field to specify the maximum number of records to be allocated to the sample group selected in the Output Name column. Select the next sample in the Output Name column and specify a maximum number of records for that group, or use the **All Remaining** check box to assign all remaining records to that sample. You can only select **All Remaining** for one output cell.

7. Ensure that each sample in the **Output Name** list has a Size defined or has **All Remaining** checked.

8. (Optional) Click **Sample Size Calculator** to use the calculator to help you understand the statistical significance of sample sizes in evaluating campaign results. You can specify the level of accuracy you want by entering an error bound and computing the sample size needed, or you can enter a sample size and compute the error bound that will result. Results are reported at the 95% confidence level.

9. In the **Sampling Method** section, specify how to build the samples:
   - **Random Sample**: Use this option to create statistically valid control groups or test sets. This option randomly assigns records to sample groups using a random number generator based on the specified seed. Seeds are explained later in these steps.
   - **Every Other X**: This option puts the first record into the first sample, the second record into the second sample, up to the number of samples specified. This process repeats, until all records have been allocated to a sample group. To use this option, you must specify the **Ordered By** options to determine how records are sorted into groups. The **Ordered By** options are explained later in these steps.
   - **Sequential Portions**: This option allocates the first *N* records into the first sample, the next set of records in the second sample, and so on. This option is useful for creating groups based on the top decile (or some other size) based on some sorted field (for example, cumulative purchases or model

scores). To use this option, you must specify the **Ordered By** options to determine how records are sorted into groups. The **Ordered By** options are explained later in these steps.

10. If you selected **Random Sample**, in most cases you can simply accept the default seed.

    In rare cases, you may want to click **Pick** to randomly generate a new seed value, or enter a numeric value in the **Seed** field. Examples of when you might need to use a new seed value are:

    - You have exactly the same number of records in the same sequence and if you use the same seed value, records are created into the same samples each time.
    - You find that the random sample produces undesired results (for example, if all males are being allocated to one group and all females to another).

11. If you selected **Every Other X** or **Sequential Portions**, you must specify how records will be sorted. The sort order determines how records will be allocated to sample groups:

    a. Select an **Ordered By** field from the drop-down list or use a derived field by clicking **Derived Fields**.

    b. Select **Ascending** to sort numeric fields in increasing order (low to high) and sort alphabetic fields in alphabetical order. If you choose **Descending**, the sort order is reversed.

12. Click the **General** tab if you want to modify the default **Process Name** and **Output Cell Names**. By default, output cell names consist of the process name followed by the sample name and a digit. You can accept the default**Cell Codes** or uncheck the **Auto Generate Cell Code** box and assign codes manually. Enter a **Note** to clearly describe the purpose of the Sample process.

13. Click **OK**.

The process is configured and enabled in the flowchart. You can test run the process to verify that it returns the results you expect.

## About the sample size calculator

Campaign provides a sample size calculator to help you understand the statistical significance of sample sizes in evaluating campaign results. You can specify the level of accuracy you want by entering an error bound and computing the sample size needed, or you can enter a sample size and compute the error bound that will result. Results are reported at the 95% confidence level.

**To use the sample size calculator:**

1. On the **Sample** tab of the Sample process configuration dialog, click **Sample Size Calculator**.

   The Sample Size Calculator window appears.

2. Under **Response Rate Estimate**, enter your estimates of the minimum and maximum response rates expected from your marketing campaign.

   These two values must be percentages between 0–100. The lower the expected response rate, the larger the sample size must be to achieve the same level of accuracy.

3. Under **Modeling Estimate**, provide modeling estimate information.

   - If you are not using a model, select **No Model**.
   - If you are using a model, select **Model Performance**, then enter the appropriate model performance percentage. This represents the area under the lift curve and is reported in the **Model Performance** report.

4. To compute the required sample size for a specific error bound:
   a. In the **Error Bound (+ or -)** field, enter a value 0 - 100 for the acceptable error bound.
   b. Click **Compute Sample Size**. The minimum sample size required to achieve the specified error bound is displayed in the Min. Sample Size text box.
5. To compute the error bound expected with a particular sample size:
   a. Enter the sample size in the **Min. Sample Size** text box.
   b. Click **Compute Error Bound**.
      The error bound is displayed in the **Error Bound (+ or -)** text box.
6. When you are finished, click Done.
   The Sample Size Calculator window closes.

   **Note:** You can copy and paste the calculated sample size to use in the Sample process configuration dialog.

## Audience

Audience levels define the target entity with which you want to work, such as account, customer, household, product, or business division, and are defined during the table mapping process by your system administrators.

Use the Audience process in a flowchart to switch between audience levels, or to filter out IDs by audience level. Using this process, you can select all, some, or a single entity at one level in relation to another level.

For example, you can use the Audience process to:
- Select one customer per household based on some business rule (for example, oldest male or the person with the highest account balance);
- Select all accounts belonging to a particular set of customers;
- Select all accounts with a negative balance belonging to a particular set of customers;
- Select all households with individuals holding checking accounts;
- Select customers with three or more purchases within a specified time-frame.

**Note:** The Audience process can select from any defined table(s), so you can also use it as a top-level process in your flowchart to initially select data.

### Audience levels

Audience levels are defined by Campaign administrators to represent different potential targets of campaigns, such as account, customer, household, product, or business division. Audience levels are often, but not always, organized hierarchically. Here are some examples of hierarchical audience levels that are commonly found in customer marketing databases:
- Household > Customer > Account
- Company > Division > Customer > Product

Your organization can define and use an unlimited number of audience levels. If you are using multiple audience levels (for example, customer and household), it is important to understand how to use the Audience process to best accomplish your business objectives.

Audience levels are created and maintained by a Campaign administrator. Moving from one audience level to another requires that all of the audience levels that you

use have keys defined within the same table. This provides a "look up" mechanism to switch from one level to another.

Audience levels are global, and are attached to each mapped base table. Thus, when a flowchart is loaded, the audience levels are loaded along with the table mappings within that flowchart.

If you have permissions to map tables in Campaign, you can map a new table to one or more existing audience levels, but you cannot create new audience levels. Only users with the appropriate permissions, usually system administrators, can create audience levels.

In the Audience process, you specify an input audience level and an output audience level. The input and output audience levels can be the same (for example, Customer) or different (for example, Customer and Household). Use the Audience process to stay within the same audience level, or to switch audience levels.

## Householding

"Householding" is as a general term to describe reducing the number of members in the current audience level by scoping using another audience level. One of the most common examples of householding is to identify a single individual to target within each household. You might select one individual per household according to a marketing business rule such as:

- The individual with the greatest dollar value across all accounts;
- The individual with the most purchases in a particular product category;
- The individual with the greatest tenure; or
- The youngest male over 18 within the household.

You can use the Audience process to change audience levels and filter IDs according to user-specified criteria.

## Switching levels

Some complex campaigns require processing at different audience levels to arrive at the list of final target entities. This can involve starting at one audience level, performing some computations and taking this output, then moving to another audience level, and performing other computations.

For example, you might want to support complex suppressions at different levels. As a result, in a data model where there is a one-to-many or many-to-many relationship between customers and accounts, a marketing analyst might want to build a campaign that does the following:

- Eliminates all accounts of customers that satisfy certain criteria (for example, eliminate any account that is in default);
- Eliminates particular accounts that satisfy certain criteria (for example, eliminate all the low-profitability accounts).

In this example, the campaign might start at the customer level, perform customer-level suppressions (suppress accounts in default), switch to the account level, apply account-level suppressions (suppress low-profitability accounts), and then switch back to the customer level to obtain the final contact information.

## Configuring the audience process

To use the Audience process, you must work with tables for which multiple audience levels are defined. These levels, defined within a single table, provide a relationship to "translate" from one level to another.

- One key is defined as the "primary" or "default" key for the table. (This default key represents the audience used most frequently for this data source.)
- The other keys are "alternate" keys that are available for switching audience levels.

Once you switch audience levels, Campaign displays only those tables whose default key is defined at the same audience level. If you work at different audience levels on a regular basis, you might need to map the same table more than once within Campaign, each time with a different primary/default key. The default level associated with a table is specified during the table mapping process. For more information about mapping tables, see the Campaign Administrator's Guide .

The options available in the Audience process configuration dialog depend on various choices that you can make:
- Whether the input and output audience levels are the same or different;
- Whether the audience level values are normalized in these tables;
- Whether there are multiple audience levels defined for the selected tables.

For this reason, not all of the options described in the following sections are available for all pairs of input and output table selections.

**To configure an Audience process:**

1. Within a campaign, open a flowchart for editing.
2. Click the Audience process in the palette, then click the workspace to add the process to your flowchart.
3. Ensure that your Audience process is connected to one or more configured processes (such as a Select or Merge process) whose output cells will be used as input by the Audience process.
4. Double-click the Audience process in the flowchart workspace.

   The process configuration dialog appears.
5. On the Source tab, choose the input data source from the **Input** drop-down list. If one or more processes are connected to the Audience process, their output cells will also appear in the list.

   The audience level corresponding to this input is now displayed next to the **Input** field. If there is no input into the Audience process, the audience level is shown as "not selected."

   The Select options also reflect your input audience level. For example, if you chose an input with an audience level of Customer, the **Select** options change to **All Entries**, **Some Entries**, and **One Entry per Customer.**
6. Select the output audience from the **Choose Audience** drop-down list. The list displays only audience levels defined for tables containing keys defined at the same audience level as the input data source. If a table has more than one level defined, each level is available as an entry in the **Choose Audience** list.

   **Note:** If you do not see a desired audience level, you might need to remap a table.

   The **Select** options now reflect both your input and your output audience levels.

   For example, if your input has an audience level of Household and you choose an output audience level of Individual, the **Select** options are labeled: **All Individual ID Entries** , **Some Individual ID Entries** , **One Individual ID**

**Entry per Household ID**, so you can specify how IDs are selected while you switch from one audience level to another.

7. Use the **Select** and **Filter** options to specify how you want the records to be selected. These options vary depending on whether you are selecting All IDs (in which case there are no filtering options), switching levels, or staying at the same level. For details on how to select and filter based on whether you are switching audience levels, see:
   - Using the same input and output audience levels
   - Using different input and output audience levels

8. Click the **Cell Size Limit** tab if you want to limit the number of IDs generated by the process.

9. Click the **General** tab to supply a **Process Name** and a **Note** that indicates the purpose of the process (for example, "This box contacts one individual per household"). You can also modify the **Output Cell** names or **Cell Codes**.

10. Click **OK**. The process is configured and is enabled in the flowchart. You can test run the process to verify that it returns the results you expect.

### Example: Audience process

The following figure shows a configured Audience process.



- The selected input audience level is **Customer** ; it is the default audience level of the DEMO_ACCOUNT table (this audience level is displayed to the right of the **Input** field).
- The output audience level is the same: **Customer** as defined in the DEMO_ACCOUNT table. The DEMO_ACCOUNT table has two other audience levels defined: Branch and HouseHold .
- The process is configured to choose one **Customer Entry per HouseHold** based on the maximum of the field HIGHEST_ACC_IND .

## Example: Filtering records

When you configure an Audience process to select IDs based on a count, or a statistical function ( **MaxOf** , **MedianOf** , **MinOf** ) or **Any One** , the **Filter** button becomes available. When you click **Filter** , the Specify Selection Criteria window appears, which allows you to enter a query expression to specify which records will be used in the **Based On** calculation.

**Note:** The filtering criteria is applied before the Based On calculation is performed, allowing you to remove records from consideration.

For example, you might want to constrain the date range over which an operation is performed. To use only purchase transactions over the last year, you can enter a filter query expression such as:

```
CURRENT_JULIAN() - DATE(PURCH_DATE) <= 365
```

Then, if you are computing a **Based On** calculation that chooses the sum of the **Amount** field, only the amounts from transactions within the last year are summed together.

## Using the same input and output audience levels

When the same audience level is selected in the **Choose Audience** list and the **Input** list, you can use the **Select** options to perform the following operations:

- "To select one <Input/Output Audience> entry per <Different Audience>"
- "To select some <Audience> records per <Different Audience>" on page 55
- "To select entries for each entry at that audience level" on page 56

The **Select** options vary depending on the relationship of the selected input and output audience levels. Options that are not meaningful are disabled.

**Note:** Campaign includes the name of the selected audience level in the **Select** option labels. For example, if the input audience level is Customer, the **One Entry per** option appears as **One Customer Entry per**. In the following sections, this dynamically changing portion of the option text is indicated with <Input/Output Audience> where appropriate.

The **Select** options include:

*Table 11. The Select options for Audience process configuration*

| Method | Description | Example |
|---|---|---|
| One Per | One member of the input/output audience level, scoped by another audience level | One customer per household |
| Some Per | Some members of the input/output audience level, scoped by another audience level | All customers with above average purchases within the household |
| For Each | Select members if the number of members at the selected audience level satisfies some condition | Number of accounts > 1, or number of purchases > 3 |

**To select one <Input/Output Audience> entry per <Different Audience>:**

Choose this option if the input and output audience levels are the same, but a different audience level is used to scope the output. For example, you can select the one customer within each household who has the oldest account. (Input

audience level is customer, output audience level is customer, scoping by Household level, using `MinOf(BaseInfo.AcctStartDt)` to select.)

Specify a business rule to indicate how the single entity is selected (for example, the minimum, maximum, or median of some field), or else choose **Any One** (in this case, no field choices are available).

1. Select an input source for **Input** and the same audience level for the output audience in the Audience process.

   The relevant **Select** options become available.

2. Select the **One Entry per** option.

   A drop-down list appears next to the selected option.

3. Select an audience level from the drop-down list.

   All alternate defined audience levels (other than the input audience) appear in the list.

4. Choose a value to use from the **Based On** drop-down list:

   - **Any One** eliminates the need to pick a **Based On** value
   - **MaxOf** returns the maximum value of the selected field
   - **MedianOf** returns the median value of the selected field
   - **MinOf** returns the minimum value of the selected field

   Each of these functions will return exactly one member from the input audience level. If more than one entry is tied at the maximum, minimum, or median value, the first encountered entry is returned.

5. If you selected a **Based On** criterion other than **Any One,** select a field on which the function operates. This drop-down list includes all the fields from the table selected in the **Choose Audience** field, and any mapped dimension tables. Expand a table by clicking the " **+** " sign. Created derived fields are listed at the bottom.

   For example, to select the account holder from each household with the highest account balance, you would select "**MaxOf**" for the **Based On** criteria and `Acct_Balance` from the list of table fields.

   You can also create or select derived fields by clicking **Derived Fields**.

6. (Optional) If you selected a count to be based on, the **Filter** button becomes available.

   Use the **Filter** function to reduce the number the IDs that will be available to the **Based On** calculation. For example, you might want to select customers based on their average account balance in the last 6 months, but prior to doing that, you would want to filter out all customers whose accounts are inactive.

   To filter records before performing the **Based On** computation, click **Filter** . The Specify Selection Criteria window appears. You can enter a query expression to specify which records will be used in the **Based On** calculation. The filtering criteria is applied before performing the **Based On** calculation, thereby allowing you to remove records from consideration.

7. Click **OK** to save your query and close the Specify Selection Criteria window.

8. Continue configuring the process by completing the fields on the remaining tabs.

**To select some <Audience> records per <Different Audience>:**

This selection indicates that there are multiple entries per audience. In this situation, the input and output audience levels are the same, but a different audience level is used to scope the output. You might select this option, for

example, to select all customers within each household who have made purchases over $100 (Input audience level is customer, output audience level is customer, scoping by Household level, using `Maximum Purchase Value`>$100.

In addition to creating a query, the Based On criterion also supports keywords allowing the functional equivalent of a GROUPBY macro function to be performed.

1. Select an input source for Input and the same audience level for the output audience in the Audience process. The relevant Select options become available.

2. Select the Some Entries per... option. A drop-down list appears next to the selected option.

3. Select an audience level from the drop-down list. All alternate defined audience levels (other than the input audience) appear in the list.

4. Click in the Based On field to enter a query. The Specify Selection Criteria window opens.

5. Enter or build a valid query expression, then click OK to save it and close the Specify Selection Criteria window.

6. Continue configuring the process by completing the fields on the remaining tabs.

**To select entries for each entry at that audience level:**

This selection indicates that there are multiple selections from multiple audience levels. Select this option if the number of members at the selected audience levels satisfies some condition (for example, `Number of Accounts > 1` or `Number of Purchases > 3` ).

**Note:** This option is available only if the input audience level is not normalized (that is, the record ID is not unique in the selected Choose Level table), and the input and output levels are the same. It is the only option available if no alternate keys have been defined for your output audience table.

1. Select an input source for **Input**and the same audience level for the output audience in the Audience process.

   The relevant **Select** options become available.

2. Select the **For Each** option.

   **Note:** This option is available only if the input audience level is not normalized (that is, the record ID is not unique in the selected Choose Level table).

   A drop-down list appears next to the selected option.

3. Choose a **Based On** selection.

   If the table you select under **Choose Audience** (that is, the output audience) is not normalized, there might be duplication in your results. You can use a **Based On** method for Campaign to use when selecting records, to avoid duplication. (For example, if your results might include more than one individual in the same household, you can use **Based On** to select only one individual from that household, based on the criterion you configure in this feature.)

   You must select one of the **Based On** methods, either **Count** or **Condition**:

   • Specify a **Count** to use in **Based On**:

   This option lets you select the `<Input Audience Level>` ID, where the number of occurrences of the `<Input Audience Level>` ID satisfies the specified condition.

To toggle between different relationships (<,<=,>,>=,=), click the operator button repeatedly until the desired relation is displayed.

-- OR --

• Specify a **Condition** to use in **Based On**:

Click in the text box to the right of **Condition**.

The Specify Selection Criteria window appears.

Enter or build a valid query expression, then click **OK** to save your entry and close the Specify Selection Criteria window.

4.  (Optional) If you selected a count to be based on, **Filter** becomes available.

Use the **Filter** function to reduce the number the IDs that will be available to the **Based On** calculation. For example, you might want to select customer IDs based on their average account balance in the last six months, but before doing that, you would want to filter out all customers whose accounts are inactive.

To filter records before performing the **Based On** computation, click **Filter**. The Specify Selection Criteria window appears. You can enter a query expression to specify which records will be used in the **Based On** calculation. The filtering criteria is applied before performing the **Based On** calculation, allowing you to remove records from consideration.

5. Click **OK** to save your query and close the Specify Selection Criteria window.

6. Continue configuring the process by completing the fields on the remaining tabs.

## Using different input and output audience levels

If you selected different input and output audiences for the **Choose Audience** list and the **Input** list, you can use the **Select** options to perform the following operations:

• "To select all <Output Audience Level> entries"
• "To select some <Different Output Audience Level> entries" on page 58
• "To select one <Output Audience> per <Different Input Audience>" on page 58

**Note:** Campaign includes the name of the selected audience level in the **Select** option labels. For example, if the input audience level is Customer, the **One Entry per** option appears as **One Customer Entry per**. In the following sections, this dynamically changing portion of the option text is indicated with <Input/Output Audience> where appropriate.

The **Select** options include:

*Table 12. The Select options for Audience process configuration (different input and output)*

| Method | Description | Example |
|--------|-------------|---------|
| All | Select all members of the input audience level, scoped by another audience level | All customers per household |
| Some | Select some members of the output audience level, keeping only those IDs that satisfy a specified condition | All customers aged 18 or over within a household |
| One Per | Select exactly one output audience record for each input audience record | One customer per household |

**To select all <Output Audience Level> entries:**

Select this option to switch to the output audience level without performing any filtering (for example, to select all customers in a household or all accounts belonging to a customer). This creates an output cell with all output audience level entries associated with the input IDs. It switches audience levels without applying any selection or filtering criteria.

If you change from a primary audience level to another audience level, you will no longer be able to use derived fields in the following processes.

1. Select an input source for **Input** and a different output audience for **Choose Audience**.

   The **Select** options become available.

2. Select **All <Output Audience Level> Entries**.

3. Click **OK** to close the Audience process configuration dialog and save the configuration.

**To select some <Different Output Audience Level> entries:**

Select this option to switch from the input audience level to a different output audience level, keeping only those IDs that satisfy a specified condition. For example, you could select all customers aged 18 or over within a household, or select all accounts of a customer with positive balances.

The **Based On** criteria allows you to enter a query expression to limit the output audience level entries selected.

1. Select an input source for **Input** and a different output audience for **Choose Audience**.

   The **Select** options become available.

2. Click to select **Some <Output Audience Level> Entries**.

   The **Based On** field becomes available.

3. Click in the **Based On** field to enter a query.

   The Specify Selection Criteria window appears.

4. Enter or build a valid query expression, then click **OK** to save the query and close the Specify Selection Criteria window.

5. Click **OK** to close the Audience process configuration dialog, saving your entries.

**To select one <Output Audience> per <Different Input Audience>:**

Select this option to choose exactly one output audience record for each input audience record (for example, to choose one email address per customer). You must specify a business rule to indicate how the single entity should be selected (min/max/median of some field) or choose **Any One** (in this case, no field choices are available).

This option is available only if the input audience level is not normalized (that is, the record ID is not unique in the selected **Choose Level** table).

In addition to creating a query, the **Based On** criterion also supports keywords allowing the functional equivalent of a GROUPBY macro function to be performed.

1. Select an input source for **Input** and an output audience for the Audience process.

   The **Select** options become available.

2. Select **One <Output Audience Level> per <Input Audience Level>**.

3. Select a value from the **Based On** drop-down list.

   (Field selection, using the drop-down list to the right, becomes inactive when you select **Any One**. If this is your selection, skip to step 5.)

4. Select a field in the next drop-down list to which the **Based On** function relates:

   a. Click in the **Based On** text box.

      The Select Field window appears. All fields from the table selected in the **Choose Audience** drop-down list appear, including any mapped dimension tables.

      You can expand a table by clicking the "+" sign. Created derived fields are listed at the bottom.

   b. Select a field and click **OK**.

   c. (Optional) Create derived fields by clicking **Derived Fields**.

5. (Optional) To filter records before performing the **Based On** computation, use **Filter**.

6. Click **OK** to close the Audience process configuration dialog, saving your entries.

# Extract

The Extract process allows you to select fields from one table and write them out to another table for subsequent processing. It is designed to pare down a large amount of data to a manageable size for subsequent operations, resulting in vast improvements in performance.

The Extract process can take input from a cell (if it is connected to a **Select** process, for example), single table, strategic segment, optimized list (Optimize only), or eMessage landing page (eMessage only). If you select a strategic segment as input, you must join it to a table before you can extract fields.

If you use several Extract processes in a series, only the fields in the final Extract process are written out.

If you use several Extract processes in parallel (that is, in different branches in the same flowchart), they behave in the same way as persistent derived fields:

* The extracted fields attach to the inbound cell
* The extracted fields are calculated before query execution in that process
* Multiple extracted fields are available in subsequent processes
* When extracted fields are sent to a contact process:
  – If an extracted field is not defined for a cell, its value = NULL
  – If a single ID is in more than one cell, one row is output for each cell
* When extracted fields are sent to a Segment or Decision process, an extracted field must exist in all selected input cells for it to be used in segmenting by query.

## Extracted tables

Data is extracted as either a binary file on the Campaign server or as a table in a data mart with a **UAC_EX** prefix.

Unlike a temp table, an extracted table is *not* deleted at the end of a flowchart run. It needs to persist so that users can continue to access it in order to perform operations on it, like profiling its fields, for example.

An extracted table is only deleted when you delete its associated Extract process, flowchart, campaign, or session.

**Note:** In order to conserve space in the data mart, your system administrator can periodically delete tables with a **UAC_EX** prefix. Note, however, that if these tables are removed, before rerunning their flowcharts or attempting to profile fields in the now-missing tables, users must first rerun their affected Extract processes. Otherwise, Campaign generates "Table Not Found" errors.

## Example: Extracting transaction data

Assume that you have designed a campaign to perform selections or calculations based on the last three months of purchase transactions for all non-delinquent customers (approximately 90% of your customer base), resulting in 4 Gb of data.

Even if Campaign created a temporary table for these customers, joining it back to the purchase transaction table would entail pulling over approximately 90% of the 4 Gb rows (and discarding all transactions except for the last three months) to execute a GROUPBY macro, for example.

Instead, you can configure an Extract process (placed at the purchase transaction level) to pull out all transactions within the last three months, put them into a table in the database, and then subsequently run multiple GROUPBY macros and other calculations against it (for example, min/max and average).

## Prerequisites for extracting data from eMessage landing pages

The following prerequisites must be met before you can configure an Extract process to accept input from eMessage landing pages:

- eMessage must be installed, running, and enabled.
- eMessage landing pages must be appropriately configured.
- The mailing must be executed and responses from mailing recipients must be received.

For more information about eMessage landing pages, see the *eMessage User's Guide*.

## Configuring an Extract process

The procedure for configuring the Extract process differs depending upon which of the following input sources you choose:

- "To extract data from a cell, single table, or strategic segment"
-
- Optimized list (see the *Optimize User's Guide*)

## To extract data from a cell, single table, or strategic segment

1. Within a campaign, open a flowchart for editing.
2. Double-click the Extract process in the flowchart workspace.
3. Click the Extract process in the palette, then click the workspace to add the process to your flowchart.

   The process configuration dialog appears.
4. On the **Source** tab, use the **Input** list to choose the data source that you want to select from:

- Select an input cell, a single table, or a strategic segment from the **Input** list.
- If you select a strategic segment as your input data source, associate it with a table by selecting a table from the **Select Based On** list.

5. Specify the records to use as input. Select one of these options:
   - **Select All Records** to include all records in your input data source.
   - **Select Records With** to select only certain records from your input, based on criteria you define using queries.

6. If you chose **Select Records With**, create a query using one of the following methods:
   - **Point & Click**: This is the default view. Click in the **Field Name**, **Oper.**, **Value**, and **And/Or** column cells to select values to build your query. This tool provides the easiest way to create a query and helps to avoid syntax errors.
   - **Text Builder**: Use this tool to write raw SQL or use the provided macros. You can use the **Query Helper** within **Text Builder** to select IBM Unica macros, including logical operators and string functions.

7. If you are constructing a query, select the fields you want to include in your query from the Available Fields list, including IBM Unica Campaign Generated Fields and Derived Fields. For more information, see"Creating queries in processes" on page 93.

   **Note:** If your query includes a table field that has the same name as a IBM Unica Campaign Generated Field, you must qualify the field name using the following syntax: `<table_name>.<field_name>`. This syntax indicates that the table field will be used instead of the IBM Unica Campaign Generated Field.

8. On the **Extract** tab, select an output location.
   - To store the data in binary format, select **Campaign Server**.
   - To store the data in a uniquely named table with a `UAC_EX` prefix, select an available database.

9. Select fields to extract from the list of **Candidate Fields**.
   - Click **Add** to add selected fields to the list of **Fields to Extract**.
   - To remove fields from the list of **Fields to Extract**, select them and click **Remove**.
   - Use the **Up 1** and **Down 1** buttons to change the order of fields in the **Fields to Extract** list.
   - To change the default output name of a field to extract, select the field in the **Fields to Extract** list, click the name in the **Output Name** column, then enter the new name.

   For information about the fields on the Extract tab, see "Extract tab reference" on page 63.

10. Perform any of the following optional tasks:
    - Profile an available field from a cell, table, or strategic segment, click **Profile**. For more information, see"Profiling fields" on page 100.
    - Add a derived field to the list of candidate fields. See "About derived fields" on page 167
    - Specify that duplicate IDs are excluded from the output. See"Skipping duplicate IDs in process output" on page 108.
    - Limit the size of the output cell (that is, limit the number of IDs generated by the process). See "Limiting the size of output cells" on page 131.

- Click the **General** tab to modify the **Process Name**, **Output Cell** names, or **Cell Codes**, link to a target cell, or enter a **Note** about the process.

  For information about linking to target cells, see "To link flowchart cells to target cells using the process configuration dialog" on page 139.

11. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test run the process to verify that it returns the results you expect.

## To extract data from an eMessage landing page

Ensure that your IBM Unica environment meets the requirements before attempting to extract eMessage landing page data. For more information, see "Prerequisites for extracting data from eMessage landing pages" on page 60.

1. In a flowchart in **Edit** mode, double-click the Extract process in the flowchart workspace.

   The process configuration dialog appears.

2. On the **Source** tab, select **eMessage Landing Pages**.

3. In the popup window, select an eMessage landing page as input.

   **Note:** You can select only one eMessage landing page as input to an Extract process. To extract data from more than one landing page, configure multiple Extract processes.

4. If there is more than one audience level available for the landing page, select the appropriate audience level from the drop-down list. If there is only one audience level available, it is automatically selected.

5. Click **OK**.

6. On the **Extract** tab, select an output location.
   - To store the data in binary format, select **IBM Unica Campaign Server**.
   - To store the data in a uniquely named table with a `UAC_EX` prefix, select an available database.

7. Select fields to extract from the list of **Candidate Fields**.
   - Click **Add** to add selected fields to the list of **Fields to Extract**.
   - To remove fields from the list of **Fields to Extract**, select them and click **Remove**.
   - Use the **Up 1** and **Down 1** buttons to change the order of fields in the **Fields to Extract** list.
   - To change the default output name of a field to extract, select the field in the **Fields to Extract** list, click the name in the **Output Name** column, then enter the new name.

   For information about the fields on the Extract tab, see "Extract tab reference" on page 63.

8. Perform any of the following optional tasks:
   - Add a derived field to the list of candidate fields. See "About derived fields" on page 167
   - Specify that duplicate IDs are excluded from the output. See "Skipping duplicate IDs in process output" on page 108.
   - Limit the size of the output cell (that is, limit the number of IDs generated by the process). See "Limiting the size of output cells" on page 131.
   - Click the **General** tab to modify the **Process Name**, **Output Cell** names, or **Cell Codes**, link to a target cell, or enter a **Note** about the process.

For information about linking to target cells, see "To link flowchart cells to target cells using the process configuration dialog" on page 139.

> **Note:** Profiling is not available for eMessage landing page attributes.

9. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

**Note:** During the extraction process, Campaign creates an intermediate view in the system tables database with a UCC_LPV prefix. This internal view remains in the database until the process box is deleted. If you remove the view, you must reconfigure its corresponding Extract process before rerunning the process or flowchart; otherwise, Campaign generates a missing table error.

### Extract tab reference

The following table describes the fields on the Extract tab:

*Table 13. Fields on the Extract tab*

| Field | Description |
| --- | --- |
| Target Data Source | Location to which the output from this process will be written. The Campaign Server and any other data sources to which you are connected are available from the Target Data Source drop-down list. |
| Candidate Fields | List of fields available to extract, including field name and data type, based on your input data source.<br><br>If your input source is a landing page in eMessage, each field name is an attribute of the landing page. If the attribute contains special characters or spaces, it is converted to a valid field name. Data types of all landing page attributes are listed as text.<br>**Note:** Schema object names are limited to 30 characters. Restrict your attribute names to 30 characters or less to produce valid column names for extracted output. |
| Fields to Extract | Fields you chose to extract from the Candidate Fields list. The Output Name defaults to the field name in the Fields to Extract column. |
| Profile button | Opens the Profile Selected Field window, which calculates the values and distributions of records in the selected field. Active only when a field name is selected in the **Candidate Fields** list. |
| Derived Fields button | Opens the Create Derived Field window. |
| More button | Opens the Advanced Settings window, which includes the option to skip duplicate records and to specify how Campaign identifies duplicates. |

## Run processes

Once you have built your campaign to select the audience you want, you need to output the results in a usable way using the run processes. Run processes control the running of the flowchart and trigger actual customer contact.

Run processes control the actual execution of completed campaigns, which includes the management and output of contact lists, the treatment of target audiences, the tracking of responses and contacts, the logging of data, and the scheduling of campaign or session runs.

The run processes are:

- "Snapshot"
- "Schedule" on page 66
- "Cube" on page 70
- "Create Seg" on page 71
- "Mail List" on page 73
- "Call List" on page 76

**Note:** The Mail List and Call List processes are also referred to as contact processes.

## Snapshot

Use the Snapshot process to capture a list of IDs and associated data, and export them to a table or a file.

To associate or track offers with the list, use a Mail List or Call List process. To make sure that duplicate rows are not exported, use an Extract process, then snapshot the results.

### To configure a Snapshot process

1. In a flowchart in **Edit** mode, ensure that your Snapshot process is connected to one or more configured processes whose output cells will be used as input by the Snapshot process.

   **Note:** All the cells that you select as input cells must have the same audience level.

2. Double-click the Snapshot process in the flowchart workspace.

   The process configuration dialog appears.

3. Click the Snapshot tab.

   a. From the **Input** drop-down list, specify the input cells to use as the data source for the snapshot.

      **Note:** If the Snapshot process is not connected to a process that provides output cells, there will be no cells to select from in the **Input** drop-down list. The **Multiple Cells** option in the drop-down list is only available if the input process generates multiple cells.

   b. From the **Export To** drop-down list, specify a table or file to which the Snapshot output will be written.

      **Note:** You can test the Snapshot process by running the process with output exported to a temporary file that you can review.

      - If the table that you want to use does not appear in the list, or if you want to output to an unmapped table, select **Database Table**. You see the Specify Database table window, where you specify the table and database names. User variables are supported in the table name you specify here.

- If you select **File** from the **Export To** drop-down list, you see the Specify Output File window, where you specify the type of file you want to write the output to, its file name, and corresponding data dictionary.

- If you want to create a new user table, select **New Mapped Table** from the **Export To** drop-down list. For instructions, see the *Campaign Administrator's Guide*.

c. Select an option to specify how updates to the output file or table are handled:

- **Append to Existing Data**. Append the new information to the end of the table or file. If you select this option for a delimited file, labels will not be exported as the first row. This is a best practice for database tables.

- **Replace All Records**. Remove any existing data from the table or file, and replace it with the new information.

- **Update Records**. Available only if you are exporting to a table. All fields specified for snapshot are updated with the values from the current run of the process.

- **Create New File**. Available only if you are exporting to a file. This option is selected by default if you are exporting to a file. Each time you run the process, a new file is created with "_1," "_2" and so on, appended to the file name.

4. Specify the fields that are written out by the Snapshot process.

a. Select the fields that you want to include in your output from the **Candidate Fields** list.

You can use Campaign Generated Fields by expanding the list of Campaign Generated Fields, or use derived fields by clicking the **Derived Fields** button. Select multiple fields at one time using **Ctrl+Click** or a contiguous range of fields using **Shift+Click**.

b. Move selected fields to the **Fields to Snapshot** list by clicking **Add>>**.

c. Remove fields from the Fields to Snapshot list by selecting them and clicking **<<Remove**.

d. If you selected a table as the snapshot destination, the fields in that table appear in the **Export Fields** list under the **Table Field** column. You can automatically find matching fields by clicking **Match>>**. Fields with exact matches for the table field names are automatically added to the **Export Fields** list. If there are multiple matching fields, the first match is taken. You can manually modify the pairings by clicking **<<Remove** or **Add>>**.

e. If desired, reorder the fields in the **Fields to Snapshot** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

   **Note:** To view the values in a field, select the field and click **Profile**.

5. To specify that records with duplicate IDs are skipped, or specify the order in which records are output, click **More**.

You see the Advanced Settings window.

a. To specify that any records with duplicate IDs are skipped, select the **Skip Records with Duplicate IDs** check box, and choose the criteria that Campaign will use to decide which record to retain if duplicate IDs are returned. For example, you can select MaxOf and Household_Income to specify that when duplicate IDs are returned, Campaign exports only the ID with the highest household income.

   **Note:** This option only removes duplicates within the same input cell. Your snapshot data can still contain duplicate IDs if the same ID appears in

multiple input cells. If you want to remove all duplicate IDs, you must use a Merge or Segment process upstream of the Snapshot process to purge duplicate IDs or create mutually exclusive segments.

    b. To specify that the snapshot output is ordered in some way, select the **Order By** check box, the field to sort by, and the sort order. For example, you can select Last_Name and **Ascending** to specify that the list of IDs is sorted by family name in ascending order.

6. Click **OK** to close the Advanced Settings window.

    The duplicate ID skipping and sort order that you have specified is displayed below the **Fields to Snapshot** list on the **Snapshot** tab.

7. (Optional) Click the **General** tab to assign a name and/or notes to the process.

    The name appears on the process in the flowchart. The notes appear when you point to the process in the flowchart.

8. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Schedule

**Note:** The Schedule process is not related to the Unica Scheduler. The Scheduler starts a flowchart even if it is not running, while the Schedule process in a flowchart works only if the flowchart is running. You should not use the Scheduler to schedule a flowchart that uses the Schedule process.

Use the Schedule process to initiate a process, series of processes, or an entire flowchart. A Schedule process is active for a defined period of time. During that time, specified events might occur that cause subsequent connected processes to begin execution. The most common use of the Schedule process is to control timing of the entire flowchart.

You can configure a Schedule process to define the total scheduling period by setting up a time limit in days, hours, and minutes starting from when the process begins executing.

Scheduling options are both fine-grained and flexible:

- You can schedule a process to run in a wide variety of ways, including repetitively, by trigger, by calendar, and so on.
- You can combine multiple scheduling options, such as scheduling the process to run every Monday at 9:00 a.m., but also to run whenever it is triggered by a specific event (such as a hit on the website).
- You can schedule a batch process, for example, to run late at night when it will not cause interfere with daytime jobs.

There are no predetermined limits on the number of options you can use simultaneously in scheduling a flowchart, providing that the selections do not actively conflict. (For example, you cannot schedule a flowchart to run both "Once Only" and "Every Monday.")

In general, a process runs only when all of its inputs have run successfully (that is, when all processes connected to the current process have run, even if the

dependency is only temporal). However, when multiple schedule inputs exist within a branch, the process will run whenever any **one** of its inputs completes (an "or" rather than an "and" of its inputs).

A contact process with tracking enabled contains an inherent schedule. Using a Schedule process in the middle of a flowchart is an advanced feature. Make sure you are getting the desired behavior and correct results.

**Note:** If the Schedule process in your flowchart tells the flowchart to run before a previous run is complete, Campaign holds the request until the previous run is finished. Only one run can be held in this manner. In certain cases, this might mean that the flowchart does not run as many times as you expect.

For example, if your flowchart takes two hours to run, and you have a Schedule process that tries to trigger three runs that are only 10 minutes apart, Campaign will start the first run. When the Schedule process attempts to start the second run, Campaign will queue it. When the Schedule process attempts to start the third run, Campaign will ignore it. When the first run is finished, Campaign will start the second run. The third run will never start.

## To configure a Schedule process

1. In a flowchart in **Edit** mode, double-click the Schedule process in the flowchart workspace.

   The process configuration dialog appears.

2. On the Schedule tab, specify the scheduling conditions:

   a. Specify a value for **Total Schedule Period** by entering the appropriate values in the **Days**, **Hours**, and **Minutes** fields. The total schedule period is the total time over which the Schedule process is to be active. By default, the total schedule period is set to 30 days.

   b. Select a run frequency from the **Schedule to Run** drop-down list, to specify exactly when the Schedule process will activate subsequent connected processes.

      - If you select the **Once Only** option, the flowchart will run exactly once, regardless of what other schedule options have been added. If any other value is selected, then the scheduling options are connected as OR statements and the Schedule process kicks off any process to which it is connected when any option is satisfied.

      - The first option that is satisfied will begin the Schedule run. If **Schedule To Run** is the only option enabled and the setting is **Once Only**, the process runs immediately (unless a delay or user authorization has been enabled).

      - The **Hours** and **Minutes** fields enable you to specify the time at which you want the schedule to run. The time entry form is based on a 24 hour clock (also referred to as "military time"). In other words, 9 hours 30 minutes is 9:30 a.m., and 22 hours 45 minutes is 10:45 p.m. Because the time base is 24 hours, there is no need to designate a.m. or p.m.

3. If you select **Custom Run** from the **Schedule to Run** drop-down list, the **Custom Run** options become enabled. Specify whether the schedule runs at a particular time or times, or based on inbound triggers, by selecting the **Run On Time** check box and/or the **Run On Trigger(s)** check box. For more details about triggers, see the *Campaign Administrator's Guide*.

   **Note:** These choices are not mutually exclusive: you can choose to use triggers in conjunction with scheduled times.

- If you choose **Run On Time**, you must specify one or more dates and times. Multiple entries must be separated by commas. Click **Calendar** to access the Calendar feature for choosing dates and times.
- If you choose **Run On Trigger(s)** you must specify one or more triggers.

  The named trigger(s) must be defined using **Tools > Stored Triggers** for the Schedule process to be fully configured. Enter the name of each trigger that can activate this Schedule process. Separate multiple triggers with commas. The trigger name can contain any characters except commas. A trigger name does not have to be unique. You can use the same trigger in multiple campaigns or flowcharts and activate them all at the same time.

4. Specify any Delay and Authorization settings by selecting the **Wait for User Authorization Before Each Run** check box and/or the **Delay Period Before Each Run** check box.

   **Note:** These choices are not mutually exclusive: you can choose either or both.

   - If you choose **Wait for User Authorization Before Each Run**, a prompt for user authorization will appear each time any other schedule conditions are satisfied, and the Schedule process will not activate unless specific authorization is provided. If you specify this option, it takes precedence over any other schedule indicators; the process will not start unless authorization is given.

     **Note:** When a flowchart is running with a client attached, user authorization can only occur through the client. If no client is attached, any user with read/write privileges for the campaign can authorize it to continue.

   - If you choose **Delay Period Before Each Run,** you must specify the amount of time to wait after a schedule condition has been satisfied before the process runs, using the **Days**, **Hours**, and **Minutes** fields. This delay applies to all other specified schedule options. For example, if a Schedule process is configured to run at 9:00 a.m. on Monday morning with a delay of one hour, subsequent processes will begin to run at 10:00 a.m.

5. (Optional) Specify triggers to send after the Schedule run is completed by selecting the **Send Trigger(s) After Each Run** check box and specifying one or more triggers.

   If you select the **Send Trigger(s) After Each Run** check box, Campaign runs one or more triggers each time the Schedule process is activated. An outbound trigger executes a command line, which can be a batch file or a script file. The named trigger(s) must be defined using **Tools > Stored Triggers**. If you specify multiple trigger names, they must be separated by commas.

6. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you point to the process in the flowchart.

7. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

### To use the Calendar tool in the Schedule process

The Calendar tool is available from the Schedule process configuration dialog if you select **Custom Run** from the **Schedule to Run** drop-down list.

It is the same as the Calendar tool elsewhere in Campaign except that it allows you to select the time as well as the date.

1. On the **Schedule** tab of the Schedule process configuration dialog, click Calendar. This button is only enabled if you have selected **Custom Run** from the **Schedule to Run** drop-down list.

   The Calendar tool appears. The current date and time are already selected by default.

2. Specify the date you want the flowchart to run or start:
   - Click the date on the displayed month, or
   - Change the month, year, and time using the **Month** drop-down list
   - Change the year using the up and down arrows.

3. Specify the time by entering the desired time in the **Run Time** field, using the format hh:mm, followed by an a.m. or p.m. designation.

4. Click Apply to enter the specified date and time, leaving the Calendar window open, or click **OK** to enter the specified date and time and close the Calendar window.

   Leaving the Calendar window open allows you to easily enter multiple date and time selections.

## Scheduling based on triggers

The Schedule process can work with triggers in the following ways:
- "Running on triggers"
- "Sending triggers after each run" on page 70
- "Using triggers with other scheduling options" on page 70

**To configure a Schedule process to run on a trigger:**

1. On the Schedule tab of the Schedule process configuration dialog, select **Custom Run** from the **Schedule to Run** drop-down list.

   The **Custom Run** features become enabled.

2. In the **Run On Trigger(s)** field, enter the name of each trigger that can activate this Schedule process. Separate multiple triggers with commas.
   - The trigger name can contain any characters except commas.
   - A trigger name does not have to be unique. You can use the same trigger in multiple campaigns or flowcharts and activate them all at the same time.

**Running on triggers:**  When you select **Custom Run** from the **Schedule to Run** drop-down list, the **Run On Trigger(s)** option is available. Enable this option to specify one or more inbound triggers that activate the Schedule process.

If you enable **Run on Trigger(s)**, you must specify one or more triggers. The named trigger(s) must be defined using **Tools > Stored Triggers** for the Schedule process to be fully configured.

An inbound trigger is an external event that will automatically set a flowchart or a campaign in motion. A trigger can be anything that you define; for example, clicking a website link, receiving an email message, a telemarketer's response indicator, completion of a database upload, or any other defined event.

The **Run On Trigger(s)** option uses the IBM Unica application **unica_actrg**(included with your Campaign installation) to run. To understand how **Run On Trigger** works behind the scenes, it is helpful to look at an example.

**Example: Run on Trigger:**  An online retailer has a cross-sell campaign that runs on a trigger, so that when a customer makes a purchase, it triggers cross-sell offers.

Specifically, when the customer makes a purchase:

- The website runs the unica_actrg executable, passing the campaign code and the trigger name (web_purchase).
- The Campaign listener checks that the campaign is active and the trigger name exists, then runs the Schedule process, and the campaign flowchart is triggered.

For more details about triggers, see the *Campaign Administrator's Guide*.

**Sending triggers after each run:**  An outbound trigger executes a command line, which can be a batch file or a script file. You can have Campaign run one or more triggers each time the Schedule process activates the trigger names in the **Send Trigger(s) After Each Run** field. If you specify multiple trigger names, they must be separated by commas.

This function allows you to send an outbound trigger to an executable file. The full path and the name of the file must be defined in the Stored Trigger Definitions window. Each time the Schedule process is activated, Campaign runs the specified executable file.

**Using triggers with other scheduling options:**  Triggers can be used with any other scheduling options or alone. Used in combination, you can, for example, set up a flowchart to run every Monday at 9:00 a.m. as well as every time someone clicks on an internet banner advertisement.

If, for example, you have scheduled the flowchart to **Run On Trigger(s)** based on hits on a website, and you also specify a **Delay Period Before Each Run**, the flowchart will not begin until both the event (the Web "hit") occurs and the delay period has expired.

## Cube

The Cube process supports the creation of data cubes from dimensions based on strategic segments that have been created from customer database tables.

**Note:** The Cube process is intended to be used by technical users or IBM Unica consultants. A best practice is to create all global constructs (cubes and strategic segments, for example) in the **Sessions** area of the application.

Users can select one or more defined segments, create a cube, and then drill into the data to select a target audience which can then be converted into the appropriate processes (the Select process, for example) for inclusion in a flowchart.

### To configure a Cube process

Any cubes created in the **Sessions** area will be available globally.

1. Before you can create a cube using a Cube process, you must create a strategic segment or dimension hierarchy.
2. In a session flowchart, select a Cube process and drag it onto the workspace.
3. Double-click the Cube process in the flowchart workspace.

   You see the process configuration dialog.
4. On the **Source** tab, use the **Input Segments** drop-down list to select one or more segments as input for the cube.

   **Important:** If you are selecting more than one source segment, ensure that they all have the same audience level.

5. Click the **Cube Definitions** tab to define your cube. The Cube Definitions window appears.

   From the Cube Definitions window you can:
   - Click **Add** to add a new cube
   - Select an existing cube and click **Edit** to modify it
   - Select an existing cube and click **Remove** to delete it

6. To add a cube:
   a. Click **Add**. The Edit Cube window appears.
   b. Enter a name and a description of the cube in the appropriate areas.
   c. Select up to three dimensions from the corresponding drop-down lists. The dimensions must be related to the strategic segments that the cube source is based on.
   d. Click **OK** when you have finished entering information for the cube. The Edit Cube window closes and the new cube definition is displayed in the list of cubes on the **Cube Definitions** tab.

7. Click the **Select Additional Fields to Track** tab to specify additional fields for tracking.

   The Select Additional Fields window appears.

   From the Select Additional Fields window you can:
   - Select and move the fields you want to track from the **Available Fields** list to the **Selected Fields** list, using the **Add>>** button
   - Click **Derived Fields** to select or create derived fields to track.
   - Click **Profile** to profile a selected field.

8. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you mouse over the process in the flowchart.

9. Click **OK**.

   The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Create Seg

Use the Create Seg process to create lists of audience IDs from customer database tables. These segments can then be used as the basis for selects and for creating dimensions and cubes, or as the global suppression segment for an audience level.

The Create Seg process is designed to be used by Campaign administrators, and should be created and defined in the **Sessions** area of the application, because they are used across multiple campaigns.

**Note:** You can use this process within a campaign rather than in a session flowchart, but a best practice is to create all global constructs in the **Sessions** area of Campaign because they are used across multiple campaigns.

To work with strategic segments you do the following:
- Create a segment in the **Sessions** area of the application.
- Manage segments from the **Segments** area of the application.
- Use these segments in campaigns from the **Campaign** section of the application.

## To configure a Create Seg process

**Note:** The Create Seg process is designed to be used by Campaign administrators, and should be created and defined in the Sessions area of the application, so that the segments are strategic and are available globally for use in all campaigns.

1. In a session flowchart in **Edit** mode, add a Create Seg process to the flowchart workspace.
2. Provide input to the Create Seg process by connecting it to one or more data manipulation processes (for example, a Select process).
3. Double-click the Create Seg process.

   The process configuration dialog appears.
4. On the **Define Segments** tab, do the following:
   a. Select one or more source cells from the **Input** drop-down list. These source cells will be turned into segments.
   b. Select **Create Mutually Exclusive Segments** if you want the created segments to be mutually exclusive.
   c. In the **Result Segments** area, highlight an input cell and click **Edit** to configure the segment.

   The Edit Segment window appears.
5. From the Edit Segment window, do the following:
   a. Give the segment a name that describes its purpose, and a brief description of what the segment is designed to do.
   b. From the **Under Folders** drop-down list, select a folder where the segment will be stored.
   c. From the Temp Table Data Source drop-down list, select a data source in which to cache the strategic segment.

      **Note:** Selecting a data source is required only if the `doNotCreateServerBinFile` property on the `Campaign|Server|Optimization` Configuration page is set to `TRUE`. If this property is not set to `True`, at least one data source must be selected.
   d. From the **Security Policy** drop-down list, select a security policy, if applicable, to which the created segment will belong.
   e. When you have finished, click **OK** to return to the **Define Segments** tab.
6. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you mouse over the process in the flowchart.
7. Click **OK**.

The process is configured and appears enabled in the flowchart.

**Note:** Strategic segments are created and made available for selection only when the Create Seg process has run successfully in production mode. Running the Create Seg process in test mode does not create or update strategic segments.

You can test the Create Seg process, but test runs do not create strategic segments or update existing ones.

# Mail List

The Mail List process is one of the contact processes. It uses output cells from other processes in your flowchart to generate a contact list for a direct mail campaign, assign specific offers to that contact list, and log the contact history.

## To configure a contact process (Mail List or Call List)

1. In a flowchart in **Edit** mode, ensure that your contact process is connected to one or more configured processes whose output cells will be used as input by the contact process.

   **Important:** All the cells that you select as input cells must have the same audience level.

2. Double-click the contact process in the flowchart workspace.

   The process configuration dialog appears.

3. On the **Fulfillment** tab, specify the fulfillment details of your list output.

   a. From the **Input** drop-down list, specify the input cells to use as the data source for the contact list.

      **Note:** If the contact process is not connected to a process that provides output cells, there will be no cells to select from in the **Input** drop-down list. The **Multiple Cells** option in the drop-down list is only available if the input process generates multiple cells.

   b. (Optional) To specify where to write the contact list output, be sure that the **Enable Export To** check box is selected and use the drop-down list to specify one of the following options:

      - If you want to write the process output to a database table, select its name from the **Enable Export To** drop-down list.

      - If the database table that you want to use does not appear in the list, or if you want the process output to be written to an unmapped table, select **Database Table** from the drop-down list to open the Specify Database table window. Use this window to specify the table and database names. User variables are supported in the table name you specify here.

      - If you want to write the process output to a file, select **File** from the **Enable Export To** drop-down list to open the Specify Output File window. Use this window to specify the type of file you want to write the output to, its file name, and corresponding data dictionary.

      - If you want to create a new user table, select **New Mapped Table** from the **Enable Export To** drop-down list. For instructions, see the *Campaign Administrator's Guide*.

      **Note:** You can test the contact process by running the process with output exported to a temporary file that you can review.

      The **Enable Export To** check box is selected by default. If you clear it, you can run the process without any output to a file or database table.

   c. (Optional) Create a Summary File (.sum) for this process by entering a path and file name in the **Summary File** field, or navigate to a location by clicking the ellipsis button. A summary file contains information about the export that might be required by a mailing house to facilitate mailings.

   d. (Optional) Send a trigger when the process finishes running by selecting the **Send Trigger(s)** check box, and choosing the trigger you want to send from the drop-down list. To send multiple triggers, use **Ctrl+Click** to select

each trigger you want to add. The selected triggers will appear in the **Send Trigger(s)** field, separated by commas.

4. Click the **Treatment** tab to assign one or more offers or offer lists to each target cell defined in this process. Click the **Parameters** tab to specify offer parameters for each cell.

5. Click the **Personalization** tab to specify the fields that are written out to your contact list.

   a. Select the fields that you want to include in your output from the **Candidate Fields** list.

      You can use IBM Unica Campaign Generated Fields by expanding the **IBM Unica Campaign Generated Fields** list, or use derived fields by clicking the **Derived Fields** button. Select multiple fields at one time using **Ctrl+Click** or a contiguous range of fields using **Shift+Click**.

   b. Move selected fields to the **Export Fields** list by clicking **Add>>**.

   c. Remove fields from the **Export Fields** list by selecting them and clicking **<<Remove**.

   d. If you selected a table as the export destination, the fields in that table appear in the **Export Fields** list under the **Table Field** column. You can automatically find matching fields by clicking **Match>>**. Fields with exact matches for the table field names are automatically added to the **Export Fields** list. If there are multiple matching fields, the first match is taken. You can manually modify the pairings by clicking **<<Remove** or **Add>>**.

   e. If desired, reorder the fields in the **Export Fields** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

      **Note:** To view the values in a field, select the field and click **Profile**.

6. To specify that records with duplicate IDs are skipped, or specify the order in which records are output, click **More**.

   You see the Advanced Settings window.

   a. To specify that any records with duplicate IDs are skipped, select the **Skip Records with Duplicate IDs** check box, and choose the criteria that Campaign will use to decide which record to retain if duplicate IDs are returned. For example, you can select MaxOf and Household_Income to specify that when duplicate IDs are returned, Campaign exports only the ID with the highest household income.

      **Note:** This option only removes duplicates within the same input cell. Your contact list can still contain duplicate IDs if the same ID appears in multiple input cells. If you want to remove all duplicate IDs from the contact list, you must use a Merge or Segment process upstream of the contact process to purge duplicate IDs or create mutually exclusive segments.

   b. To specify that the output contact list is ordered in some way, select the **Order By** check box, the field to sort by, and the sort order. For example, you can select Last_Name and **Ascending** to specify that the list of IDs is sorted by family name in ascending order.

7. Click **OK** to close the Advanced Settings window.

   The duplicate ID skipping and sort order that you have specified is displayed below the **Export Fields** list on the **Personalization** tab.

8. Click the **Log** tab to specify how you want to log contact transactions from this process.

**Note:** You must have the appropriate permissions to enable or disable the contact history logging options.

a. To log contact history to the system tables, check the **Log to Contact History** check box.

   **Note:** To make the contact information available for tracking and reporting throughout Campaign, log to the system tables. If you are configuring a mailing list, do **not** log to system tables if you plan to send your mailing list to a mailing house that performs processing (such as validating addresses or householding). Instead, use a Track process to log the information returned from the mailing house instead to capture only the list of customers who were mailed an offer.

b. To additionally, or instead, log to another destination than the system tables, check the **Log into Other Destination** check box.

   **Note:** You might want to store the contact information in another table or file if your organization requires further processing of the information in another format. You might also want to log the information outside the system tables if you want to test the information output by the contact process before saving it to the system tables.

c. If you selected **Log into Other Destination**, use the **Log to** drop-down list to specify a table or file.

   If you select **File**, you see the Specify Output File window, where you specify the type of file you want to write the output to, its file name, and corresponding data dictionary.

9. Specify the fields that you want to output to contact history by selecting fields from the **Candidate Fields** list, and moving them to the **Fields to Output** list using the **Add>>** button. You can also use derived fields for Candidate Fields.

   Remove fields from the **Fields to Output** list by selecting them and clicking **<<Remove**.

   If desired, reorder the fields in the **Fields to Log** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

   You can automatically find matching fields by clicking **Match>>**. Fields with exact matches for the **Table Field** names are automatically added to the **Field to Log** list. If there are multiple matching fields, the first match is taken.

10. Select an option to specify how updates to the output file or table are handled:

    - **Append to Existing Data** — append the new contact information to the end of the table or file. If you select this option for a delimited file, labels will not be exported as the first row. This is the best practice for database tables.

    - **Replace All Records** — remove any existing data from the table or file, and replace it with the new contact information.

11. To customize the information that will be written to contact history, click **More Options**.

    The Contact History Logging Options window appears.

    a. To avoid updating the contact history when this process runs, select **Create Treatments Only**.

       This option generates new treatments in the Treatments table *without* updating the contact history, essentially allowing for a delayed update to the history. For example, you might avoid writing contact history because you plan to remove invalid and duplicate addresses through

post-processing. If you wait for the list of IDs to which offers are sent, the resulting contact history will be smaller and more accurate.

Be aware that if you select this check box, other options in this window that no longer apply (because no contact history will be logged) are disabled.

By default, this check box is not selected, and contact history is updated when the process is run. For more information about logging contact history, see Chapter 9, "Contact history and response tracking," on page 151.

b. To generate new treatments with the same package ID as in the most recent process run, select **Use Last Package ID**.

All offers given in the same contact process to an individual are considered to be a single "package"; by default, **Use Last Package ID** is not selected, which specifies that each package is assigned a unique ID for each production run of the contact process.

If you selected **Create Treatments Only** to prevent the customer history from being updated, you might also select this check box to ensure that the package ID from the prior run is assigned to each set of offers, which links the offers to the existing contact history.

c. Select the audience level at which you are tracking contact history from the **Tracking Audience Level** drop-down list.

d. Enter the date on which the people in the contact list will be contacted in the **Contact Date** field. You can also click to select the date from a calendar. If you do not enter a date in this field, Campaign uses the flowchart run date.

e. Enter a status code for tracking, using the **Contact Status Code** drop-down list.

f. Select and move fields to and from the **Candidate Fields** and the **Fields to Log** list using the **Add>>**, **<<Remove**, **Match>>**, **Up1**, and **Down1** buttons in the same way as you did to select fields on the **Log** tab.

g. Click **Close** when you have finished specifying additional fields to log.

You are returned to the **Log** tab of the process configuration dialog.

12. (Optional) To clear some or all existing contact history and associated response history entries before the next run of the contact process, click **Clear History**.

Important: **Clear History** permanently deletes contact and response history records from the system tables. This data is not recoverable.

13. (Optional) Click the **General** tab to assign a name and/or notes to the process.

The name appears on the process in the flowchart. The notes appear when you point to the process in the flowchart.

14. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Call List

The Call List process is a contact process. Use it to generate a contact list (for example, for a telemarketing campaign), assign specific offers to that contact list, and log the contact history.

You configure a Call List process in the same way as you configure a Mail List process. See "To configure a contact process (Mail List or Call List)" on page 73.

## Optimization processes

Optimization processes let you fine-tune your campaign to maximize effectiveness. You use optimization processes to generate scores to refine audience selection. They allow you to track contacts and responses, and use the results of predictive modeling from Campaign or from data mining products like PredictiveInsight to refine audience selection and maximize ROI. Optimization processes can also provide the ability to determine the most effective campaign, offer, and channel across your entire organization to use for contacting each individual prospect.

The optimization processes are:
- "Track"
- "Response" on page 79
- "Model" on page 81
- "Score" on page 82

### Track

Use the Track process to update the contact statuses or additionally tracked fields for existing records in contact history.

**Note:** The Track process can only update existing rows in contact history; it cannot create new rows.

For example, if records were initially written to contact history with a contact status of "Proposed," you can use the Track process to later update records in contact history that were contacted, with a contact status of "Contacted." Or, for example, if all contacts who were sent a direct mail were written to contact history with a contact status of "Contacted" and you later received a list of undeliverable mailings, you could update individuals on that list with contact statuses of "Undeliverable."

#### To configure a Track process

1. In a flowchart in **Edit** mode, ensure that your Track process is connected to one or more configured processes whose output cells will be used as input by the Track process.
2. Double-click the Track process in the flowchart workspace.

   The process configuration dialog appears.
3. Click the **Source** tab.
   a. Select your source cell(s) from the **Input** drop-down list.
   b. Select the contact date that you want to have associated with the records updated by the Track process, using the **Contact Date** drop-down list. By default, a value of "Today" is selected. You can also use derived fields to populate **Contact Date**.
   c. Select the **Contact Status Code** that you want to associate with the records that you are updating in contact history.
4. Click the **Mapping to Treatments** tab.

   The **Candidate Action Fields** list appears, from which you can choose the relevant field to match to the Treatment Code. The treatment code uniquely identifies the row in the contact history to update.

Select the field you want to use for matching from the **Candidate Action Fields** list, and move it to the **Matched Offer/Treatment Fields** list using the **Add>>** button, so that it is paired with Treatment Code.

5. Click the **Log** tab to specify how you want to update contact history from this process.

   **Note:** You must have the appropriate permissions to enable or disable updates to contact history tables.

   a. To update contact history in the system tables, select the **Log to Contact History Tables** check box.

      If you select **Log to Contact History Tables** and you want to write additional fields to the contact history, click **Additional Fields** to display the Contact History Logging Options dialog. Use the **Add**, **Remove**, **Match**, **Up1**, and **Down1** buttons to select and move the desired fields from the **Candidate Fields** list to the **Fields to Log** list in the same way you did to select fields on the **Log** tab. Unmatched fields are not updated.

      Click **Close** when you have finished specifying additional fields to log.

   b. To log to a destination other than, or in addition to, the contact history in the system tables, select the **Log into Other Destination** check box to enable writing to an alternate table or file.

   c. If you selected **Log into Other Destination**, use the **Log To** drop-down list to specify whether the output should be written to a file, or to a new table in the database:

      If you select **File**, the Specify Output File window appears. Use this window to specify the type of file to which you want to write the output, the file name, and the corresponding data dictionary.

      If you select New Table, use the New Table Definition dialog that appears to specify the information about the new table to which you want Campaign to write the log output.

   d. If you selected **Log into Other Destination**, specify the fields that you want to output by selecting fields from the **Candidate Fields** list, and moving them to the **Fields to Output** list using the **Add>>** button.

      You can also used derived fields for Candidate Fields.

      Remove fields from the **Fields to Output** list by selecting them and clicking **<<Remove**.

      If desired, reorder the fields in the **Fields to Log** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

      You can automatically find matching fields by clicking **Match>>**. Fields with exact matches for the **Table Field** names are automatically added to the **Field to Log** list. If there are multiple matching fields, the first match is taken.

   e. Only if you have chosen **Log into Other Destination**, select an option to specify how updates to the output file or table are handled:

      • **Append to Existing Data** — append the new contact information to the end of the table or file. If you select this option for a delimited file, labels will not be exported as the first row. This is the best practice for database tables.

      • **Replace All Records** — remove any existing data from the table or file, and replace it with the new contact information.

6. (Optional) Click the **General** tab to assign a name and/or notes to the process.

The name appears on the process in the flowchart. The notes appear when you point to the process in the flowchart.

7. Click OK.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

# Response

The Response process tracks the responses of customers who were contacted in a contact process, such as Mail List or Call List. Based on rules that you define during process configuration, the Response process evaluates which responses are considered valid, and how they are credited back to campaigns or offers. The output of the Response process is written to several response history system tables, where the data can be accessed for analysis using Campaign performance and profitability reports.

In its simplest form, the Response process can appear in its own flowchart connected to a Select process (and optionally a Segment process). In such a flowchart, the Select process selects IDs from a mapped table containing data about responders and their response actions. These IDs are segmented by the Segment process into meaningful groups, and finally passed to a Response process, where response tracking rules are applied and output is written to response history tables.

A Response process is tightly aligned with its corresponding contact process, in which the responders now being tracked were possibly members of cells targeted with particular offers. Therefore, before you can configure a Response process, you must:

- Know the audience level of your contact list and ensure that contact history and response history system tables for each audience level that you are contacting and tracking, have been mapped. This is usually done by your system administrators.
- Set up a separate Response process for each audience level in which you are tracking responders.
- Know the codes representing the response types that you want to track.
- Know what Campaign-generated codes (campaign, cell, offer, or treatment codes) were sent out to your contact list, so you can map them for tracking.
- Enable Campaign to create temp tables in the Campaign system tables database (i.e., the `AllowTempTables` property must be set to true).

## To configure a Response process

1. In a flowchart in **Edit** mode, ensure that your Response process is connected to one or more configured processes whose output cells will be used as input by the Response process.
2. Double-click the Response process in the flowchart workspace.

   The process configuration dialog appears.
3. Click the **Source** tab.

   a. Select your source cell(s) from the **Input** drop-down list. The source cells originate from the mapped table in your data mart that holds your customer response information.

      **Note:** If you are using a delimited flat file as input to the Response process, you must ensure that all data types in the input files are mapped

appropriately, as this is not enforced by the Response process. Using a mismatched data type (for example, having a treatment code mapped as "numeric" when the UA_Treatment.TreatmentCode field is a "string" type) causes a database error on some databases (for example, system tables on DB2®).

b. Select the date that you want to have associated with the records output by the Response process, using the **Response Date** drop-down list. By default, a value of "Today" is selected. You can also use derived fields to populate **Response Date**.

c. Select the **Response Type Code** that you want to track. The response type codes are globally defined and available for all campaigns.

4. Click the **Mapping to Treatments** tab.

   You see the **Candidate Action Fields** list, from which you choose the relevant fields to be tracked. In the **Matched Offer/Treatment Fields** list, the **Offer/Treatment Attribute** column lists all offer or treatment attributes in the system.

   a. Select the fields that you want to track from the **Candidate Action Fields** list, and move them to the **Matched Offer/Treatment Fields** list using the **Add>>** button, so that the appropriate fields to match are paired.

      You can select multiple fields at one time using **Ctrl+Click** or a contiguous range of fields using **Shift+Click**. You can also used derived fields for **Candidate Action Fields**.

   b. Remove fields from the **Matched Offer/Treatment Fields** list by selecting them and clicking **<<Remove**.

   c. If desired, reorder the fields in the **Matched Offer/Treatment Fields** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

      **Note:** Unmapped fields, and fields for which values not available (or NULL) are not used for response attribution. For a treatment instance to receive response credit, all populated fields must match, except for controls, for which all codes are ignored.

5. Click the **Log** tab to specify the fields you want to log to response history.

   Select fields from the **Candidate Fields** list and move them to the **Fields to Log** list using the **Add>>** button. You can also used derived fields for Candidate Fields.

   Remove fields from the **Fields to Log** list by selecting them and clicking **<<Remove**.

   Reorder the fields in the **Fields to Log** list by selecting a field and clicking **Up1** or **Down1** to move it up or down in the list.

   You can automatically find matching fields by clicking **Match>>**. Fields with exact matches for the **Table Field** names are automatically added to the **Fields to Log** list. If there are multiple matching fields, the first match is taken.

6. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you point to the process in the flowchart.

7. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

# Model

Use the Model process to create a runtime model file, which you can use for real-time or batch scoring. It automates the creation of a response model that can be used to score customers or prospects to determine the candidates most likely to respond.

Typically, you set up the Model process in your flowchart to take input from two cells, one representing the responders (contacts who reacted positively or took some action upon receiving an offer or communication), and one representing the non-responders (contacts who took no action).

For example, you could use two Select processes, one selecting the people who were contacted with an offer, and the other selecting the responders. Then, use a Merge process to exclude the responders so that you have a list of non-responders. Connect the Merge output and the "responders" Select output to your Model process to provide the non-responder and responder cells for the model.

In another scenario, you could use a Select process to select all contacts for an offer, then use a Segment process to segment that cell into responders and non-responders.

## To configure a Model process

1. In a flowchart in **Edit** mode, ensure that your Model process is connected to one or more configured processes whose output cells will be used as input by the Model process.
2. Double-click the Model process in the flowchart workspace.

   The process configuration dialog appears.
3. On the **Source** tab, select your responder and non-responder cells from the **Responder** and **Non-Responder** drop-down lists. The drop-down lists are populated with input cells to the Model process; they are empty if you have no inputs to the process.

   **Note:** Both input cells must have the same audience level.
4. From the **Variables to be Used for Modeling** list, select the variables to be used by the Model process during model generation. You can select all variables (by clicking **Use All**) and let the Model process decide which set of inputs are most effective for modeling. However, by eliminating variables that do not add value to the model (for example, variables containing the same value for all records or different values for all records), you can speed up the automatic variable selection process.

   **Note:** If you are in doubt as to the predictive value of a variable, include it and let the Model process decide whether it should be used.

   You can also use derived fields in the configuration of a model.
5. On the **Method** tab, used the **Best Model** options to choose how the data mining algorithms should arrive at the best model: based on a specified length of time, or from among a specified number of candidate models.
   - **Best Model In** – (Default) Allows you to specify a time limit for modeling. The **Model** process retains the best models built in the time period that you specify. The default is three hours.
   - **Best Models Among** – Allows you to specify the number of models to build. The **Model** process will retain the best of these models. The default is 20.

6. Select the type of modeling that will be done by choosing an algorithm from the Algorithm to Use drop-down list. You can select one, several, or all.

   **Note:** Selecting **All Algorithms** (the default) will result in a more accurate model, but it might take longer.

7. Set the maximum number of models to keep by entering any positive integer in the **Max. # of Models to Keep** field. The default is five. Each of the top models are saved by appending a pound sign (#) to the end of the specified file name. If more than one model is kept, an index is appended to the base file name, indicating the rank of the model.

   **Note:** The more models you elect to keep, the more disk space is required to save the corresponding information.

8. In the **Model File Name** field, specify the absolute path name for the model file that is to be created, or click **Browse** to navigate to a file. Once you run the process it will generate a *NAME*.rtm model file, which you can use for scoring with the Score process.

9. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you mouse over the process in the flowchart.

10. Click **OK**.

The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Score

Use the Score process to rate the likelihood of each customer making a purchase or responding to an offer and to identify the best customers or prospects for the campaign that you plan to run. Scoring is based on modeling results imported from a runtime model file (.rtm file) created by PredictiveInsight or the Model process in Campaign.

The Score process might be used in a flowchart in the following way: The flowchart begins with a Schedule process which runs the flowchart every month. It is connected to a Select process which generates a list of customer IDs from data in the data mart. The IDs are then sent to a Score process for scoring against a data model. Finally, the results of the Score process are sent to a Snapshot process to be written out to a spreadsheet.

## To configure a Score process

1. In a flowchart in **Edit** mode, ensure that your Score process is connected to a configured process whose output cell(s) will be used as input by the Score process.

2. Double-click the Score process in the flowchart workspace.

   The process configuration dialog appears.

3. Use the **Input** drop-down list to select a source cell containing the customer IDs that you want to score.

   **Important:** You cannot select multiple source cells to score.

4. In the **Number of Models** field, specify the number of models you want to create by entering an integer, or by using the up and down arrow buttons to increase or decrease the count.

   **Note:** The **Parameters For** drop-down list will contain as many models as you specified in the **Number of Models** field, named Model 1, Model 2, Model 3, and so on. If you change the number of models, the models listed in the **Parameters For** drop-down list automatically change.

5. For each model that you are scoring, specify a **Score Field Name** and a **Model File**. Use the **Parameters For** drop-down list to select each model that you need to configure.

6. In the **Score Field Name** field, type the name of the field where you want the scoring results stored for that model. The default name is **score***N***_1.**

   If you type **MYSCORE** in the field and there is a single output field defined in the specified model, the score field name will be **MYSCORE**. If there are multiple outputs, the score field names will be **MYSCORE_1**, **MYSCORE_2**, **MYSCORE_3**, and so on.

   When Campaign displays the list of available fields, the score fields will appear as if they belong to a table.

7. In the **Model File** field, enter the full path and file name of the model file that you will be using to score the customer IDs.

   Enter the full path and file name of the model you want to use, or click **Browse** to evoke a standard Windows file selection window.

8. Click **Match Variables Names** to match variable names with fields from the table in the input source. The Match Variable Names window appears.

   For customers to be scored properly, you must ensure that you can match the variables used by the model with corresponding fields in the data set to be scored. For example, if the model uses an average_balance variable, you must match that variable with a field containing average balance in the data set to be scored.

   a. Select fields in the **Available Fields** list that match with fields in the data set, and move them to the **Matched Variables** list using the **Add>>** button.

      You can match identical field names automatically by clicking **Match**. This will override any manual matching.

      You can also create derived fields by clicking **Derived Fields**.

      **Important:** You must match all the variables in the **Matched Variables List** to configure the Score process. Variable names do not need to match the field names, but the data types (numeric or string) must match.

   b. When you have finished matching variable names, click OK.

      The **Match Variable Names** window closes and you are returned to the **Score** tab in the process configuration dialog.

9. (Optional) Click the **General** tab to assign a name and/or notes to the process.

   The name appears on the process in the flowchart. The notes appear when you mouse over the process in the flowchart.

10. Click **OK**.

    The process is configured and appears enabled in the flowchart. You can test the process to verify that it returns the results you expect.

## Using processes in flowcharts

Campaign allows you to easily create campaign flowcharts by visually manipulating processes. You can create, connect, configure, and run your processes, experimenting with different flowchart designs. The following section describes the tasks that you can perform with processes.

- "To add a new process to a flowchart" on page 85
- "To copy and paste a process" on page 85
- "To paste processes from the template library" on page 86
- "To move a process" on page 86
- "To delete a process" on page 87
- "To connect two processes" on page 87

## To add a new process to a flowchart

You add a process to a flowchart by clicking a process box in the palette, then clicking in the flowchart workspace.

You can also copy an existing configured process, or paste a template from the template library. Templates contain one or more configured processes and connections.

1. Within a campaign, open a flowchart for editing.
2. In the process palette, click the process that you want to add to your flowchart.
3. Click the location in the workspace where you want to place the box. Note that you cannot drag the box to a location. You must click.

   When you add processes, try to place them in a logical order in the flowchart, based on the campaign flow. Avoid placing process boxes on top of each other in the workspace. If this happens, click the top process box and move it so you can see the next box in the stack.

   Newly added processes are gray until they are configured. Configured processes are displayed in color based on their type (data manipulation processes are blue, run processes are red, and optimization processes are green).
4. Right-click the process to see a list of actions you can perform on it.

Typically, the next step is to configure the process, by double-clicking it the workspace and using the resulting dialogs. You must connect the boxes to determine the workflow. (Some processes must be connected before they are configured because they require input from a source process.) For example, you might configure a Select process to select households in a specific earning bracket, then connect it to an Audience or Merge process. Finally, you would test run the process. Save your flowchart frequently as you work.

See the other available topics for information about configuring, connecting, and running processes.

## To copy and paste a process

Copying an already-configured process can save time when you build flowcharts. You can also cut a configured process, save the configuration to the clipboard, then paste the process elsewhere on the workspace, or in another flowchart.

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.
2. From the processes that are already in the workspace, click the process that you want to copy.

   **Note:** You can **Shift+Click** to select multiple processes, drag the mouse to select a group of processes, or use **Ctrl+A** to select all the processes in the flowchart.
3. Click the **Copy** icon.

   You can also select **Copy** from the menu, or press **Ctrl+C.**
4. Click the **Paste** icon.

You can also click **Paste** from the menu, or press **Ctrl+V**.

A copy of the process appears in the workspace.

5. Click and drag the copied process to the desired area of your flowchart.

## To cut a process

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. From the processes that are already in the workspace, click the process that you want to cut.

   **Note:** You can **Shift+Click** to select multiple processes, drag the mouse to select a group of processes, or use **Ctrl+A** to select all the processes in the flowchart.

3. Click the **Cut** icon on the Flowchart toolbar.

   You can also click **Cut** from the menu, or press **Ctrl+X**.

The process is removed from the flowchart and saved on the clipboard. You can then paste this process back into the current flowchart or into another flowchart.

## To paste processes from the template library

Using templates from the template library can save time when you build flowcharts. Templates contain one or more configured processes and connections.

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. Click the **Options** icon and select **Stored Templates**.

   You see the Stored Templates window, listing the available templates.

3. Select the template you want to paste into your flowchart from the **Items List**.

4. Click **Paste Template**.

   The process or processes in the template you selected are pasted into the flowchart.

   If one or more process boxes are pasted on top of another process box in the flowchart workspace, they will appear stacked. Click the top process box and move it if you want to see the next process box in the stack.

## To move a process

You can move any process in a flowchart you are editing by dragging it to a different location on the workspace.

Campaign allows you to position processes on top of each another; however, if you have a large flowchart with many processes, it may be easier to use the zoom functionality so that you can see all processes, instead of overlapping them.

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. In the workspace, click and drag the process that you want to move to its new location.

   When you release the mouse, the process is moved to the new position. Existing connections to and from the process you are moving remain, and are redrawn for the new location.

## To delete a process

As you design and build flowcharts you might need to remove processes that you have added.

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. In the workspace, right-click the process that you want to delete, and select **Delete** from the menu.

   **Note:** You can select more than one process at the same time by holding down the **Shift** key as you select using the mouse.

   You see a confirmation message asking if you want to remove the selected items.

3. Click **OK**.

4. The selected process(es) are removed from the workspace. Any connections to and from the processes are also deleted from the flowchart.

## To connect two processes

You connect the processes in your flowchart to specify the direction of data flow and the order in which processes are run. If you move processes within the workspace, existing connections will remain, and will adjust to the moved process's new location. Connections can be easily added or deleted.

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. Move your cursor over the connection box in the process from which you want to create a connection.

   The cursor changes to three downward arrows.

3. Click and drag a line to the process to which you want to make a connection.

   The source process is highlighted. As you drag your cursor, the connecting line is drawn from the source process.

4. Release the mouse anywhere over the destination process.

The source and destination process are connected with an arrow showing the direction of data flow. The source process will run before the destination process, and data output from the source process can be available as input to the destination process.

**Note:** If the destination process receives data from the source process, the connection is shown as a solid line. If the destination process does not receive data from the source process but cannot run successfully until the source process has completed, the connection is shown as a dotted line.

## To delete a connection between two processes

1. Within a campaign, open a flowchart for editing.

   You see the process palette and workspace.

2. Click the connection that you want to delete.

3. Do one of the following:

   - Right-click the connection, and select **Delete** from the menu.
   - Press the **Delete** key.

- Click the **Cut** icon on the Flowchart toolbar.
- Press **Ctrl+X**.

The connection is deleted.

## Example: Process Connections

The following flowchart is scheduled to run automatically each night. The dotted line connections between the Schedule process and three Select processes indicate that the Select processes will not run until the Schedule process finishes running, but that no data is passed from the Schedule process to the Select processes.
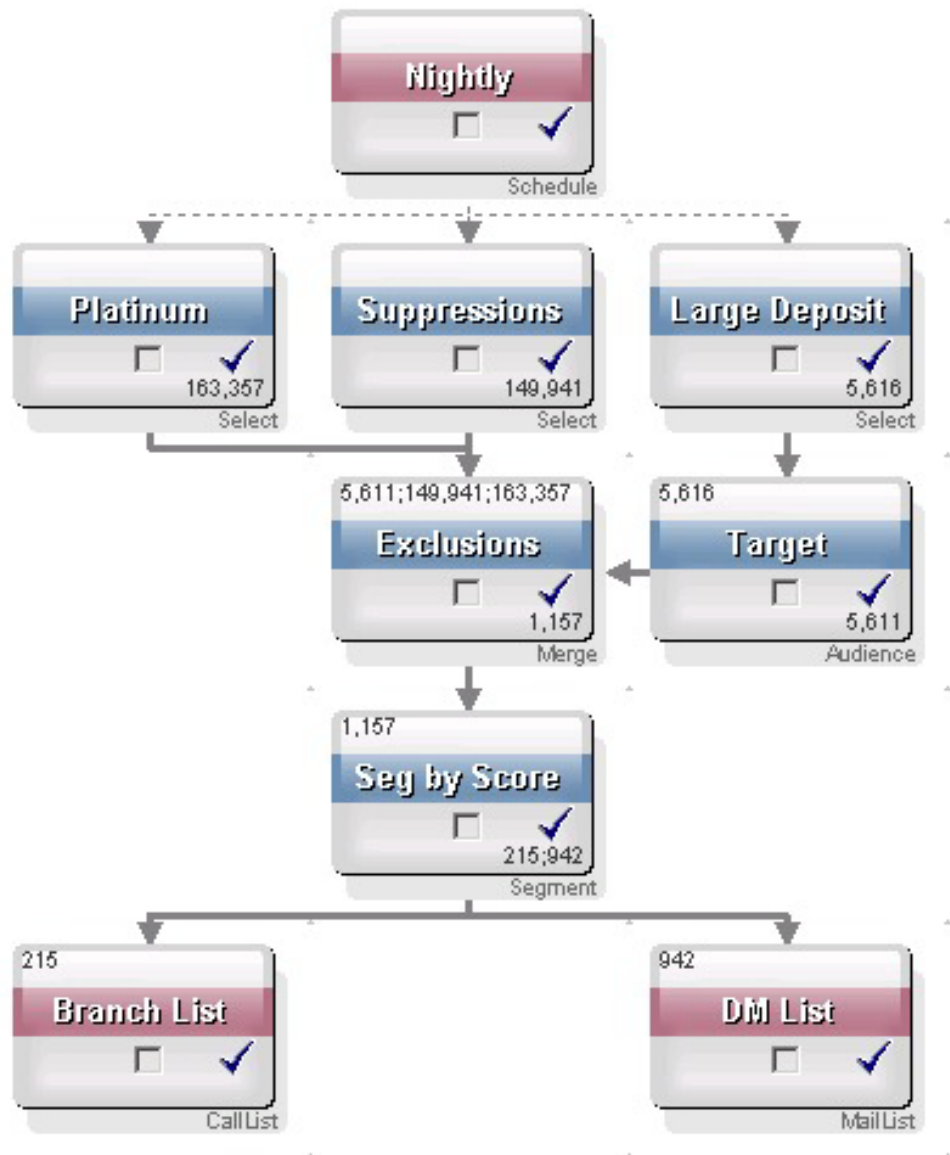


## Configuring processes

You must configure a process after adding it to your flowchart. By configuring a process, you provide Campaign with important information, such as the source of

the data the process will use, which IDs to work with, and what to do with the output. For example, you could configure a Select box to select all customers who made a purchase in the last six months.

A best practice is to place the processes in your flowchart in the order in which they will be used when the campaign is run. Some processes must be connected before they are configured because they require input from a source process.

### To access a process configuration window

1. Within a campaign or session, open a flowchart for editing.

   You see the process palette and workspace.

2. Double-click the process that you want to configure. You can also right-click the process and select **Process Configuration** from the menu.

   You see the process configuration window for the process.

3. Enter information into the fields on each tab of the process configuration window. For assistance, click **Help**.

4. When you have finished entering the configuration details, click **OK**.

   Correctly configured processes are displayed in color (the specific color reflects the type of process). A gray process with its name in italics has a configuration error. To find out more information about the error, hold your mouse over the process to display a descriptive error message.

## To run a process

To make sure that your configuration is successful and that the results are what you expect, be sure to run each process as soon as you configure and connect.

**Note:** When you run a process, any results from a previous run are lost.

1. Within a campaign, open a flowchart for editing.

2. Click the process that you want to run.

   If the process requires data from a source process, be sure that the source process has already run successfully so that its data is available.

3. Click the **Run** icon or right-click a process box, then select one of the following options:

   - **Test Run Selected Process**: Use this option when building your flowchart, so you can troubleshoot errors as they occur. Test runs do not output data or update any tables or files. (However, triggers run on completion of test runs, and global suppression is applied.)

   - **Save and Run Selected Process**: Do a production run. Processes such as Mail List and Call List will write entries into Contact History. Each production run can generate contact history only once. Contact processes that have already executed for that production run can be re-run only if the contact history from the current run is first deleted. Triggers run on completion of the production run.

   **Note:** Running only a process or a branch of a flowchart does not increment the Run ID of a flowchart. When you run only a process or a branch, if contact history records exist, you are prompted to choose run history options before you can proceed. For details, see"About run history options" on page 30.

4. When the process finishes running, click **OK** on the confirmation window.

The process displays a blue checkmark when it has run successfully. If there are errors, the process displays a red "X."

## About run history options

**Note:** You see the Run History Options window only when you run a branch or process that has already generated contact history for the current Run ID. If a new run instance does not exist for a particular re-run branch or process, the Run History Options window does not appear.

Use the Run History Options window to choose how the new contact history you generate is written to the contact history table.

**Run history options scenario:**  You have a flowchart with two branches and two contact processes, A and B, both configured to log to contact history.

You run the entire flowchart (from the top, using the Run Flowchart command) once. This creates a new Run ID (for example, Run ID = 1) and generates contact history for this Run ID.

After this first successful run of the entire flowchart, you edit contact process A to give a follow-up offer to the same individuals who received the first offer. Therefore, you want to rerun contact process A. The current Run ID is "1" and contact history already exists for process A and Run ID=1.

When you select contact process A and click "Run Process," you see the Run History Options window. You can choose to leave the Run ID unchanged (Run ID=1) and replace the existing contact history associated with this Run ID, or you can create a new run instance (that is, increment the Run ID to 2), leave the contact history associated with Run ID=1 untouched and append new contact history associated with Run ID=2.

You are sending a follow-up offer and do not want to lose the contact history associated with the first offer, so you choose **Create a new run instance**. This changes the Run ID to "2" and appends contact history records for the same IDs who received the first offer to the contact history table.

If you now edit and run contact process B, you will not see a Run History Options window, because the current Run ID = 2 and contact history associated with Run ID =2 does not exist for contact process B. Running only contact process B will simply generate additional contact history records for Run ID = 2.

**Run History Options window reference:**

The Run History Options window contains the following options.

*Table 14. Run History Options window options*

| Option | Description |
| --- | --- |
| Create a new run instance | Rerun a specific branch or process of the flowchart using a new Run ID. Append the results, associated with the new Run ID, to the contact history table. Existing contact history remains intact. |

*Table 14. Run History Options window options  (continued)*

| Option | Description |
|--------|-------------|
| Replace the contact history of the previous run | Reuse the previous Run ID and replace the contact history previously generated for that Run ID (only for the process or branch that is being run). Contact history records that were previously generated for other branches or processes of the flowchart remain intact. |
| Cancel | Cancel the branch or process run and do nothing to existing contact history. The flowchart remains open in Edit mode. |

You cannot replace contact history if associated response history exists. Therefore, if you selected **Replace the contact history of the previous run** and associated response history records exist, you can choose one of two options:

- Click **OK** to clear the associated response history records as well as the contact history records. This is your only option if response history exists and you want to replace the contact history from the previous run.
- Click **Cancel** to cancel clearing the contact history records. You can choose **Create a new run instance** instead, to create a new run instance to run the current contact process.

# Choosing data sources for processes

In many processes, including Audience, Create Seg, Cube, Extract, Model, Response, Segment, and Select, you must specify a source of the data that the process will act on. The data source for a process might be an incoming cell, segment, table, or multiple tables.

In most cases, you specify the data source for a process in the **Input** field on the first tab of the configuration window, using the **Input** drop-down list. For instructions, see the instructions for configuring each process. For example, see "To configure a Select process" on page 40.

## To select an incoming cell, segment, or table as the input to a process

On the first tab of the process configuration dialog, select the incoming cell, segment, or table from the Input drop-down list. The Input drop-down list displays all the base tables currently mapped in the table catalog, along with their audience levels. If there is an incoming cell, then only those tables with the same audience level as the cell are displayed.

## To select multiple tables as the input to a process

You can select more than one table as input to a process.
1. In the process configuration dialog, select **Tables > Multiple Tables** from the **Input** drop-down list.

   **Note:** If you select multiple tables, the tables must have the same audience level.

   You can also click the ellipsis button. The Select Tables to Use window displays all the base tables in the campaign's table catalog.
2. Check the box next to each table that you want to select.

3. Click **OK** to return to the process configuration dialog. The **Input** field displays "Multiple Tables", which you can view by clicking the ellipsis button.

## To map a new table for selecting as a source

In the process configuration dialog, select **Tables > New Table** from the Input drop-down list.

The New Table Definition window preselects the Base Record Table type. You map a new base table in a process configuration dialog in the same way that you map a table from the Table Mappings dialog.

**Note:** You must have the appropriate permissions to be able to map tables. For details about mapping tables, see the *Campaign Administrator's Guide*.

# Choosing in-database processing for processes

In-database processing is an option that you can turn on or off for your flowchart processes both globally, and for each flowchart.

**Note:** In-database processing is not supported for all databases. Your Campaign administrator can confirm whether this option is available for your data sources.

The in-database processing option determines:
- what operations are done at the database level or at the local Campaign server level; and
- what happens to the results of operations.

In general, the in-database processing option improves flowchart performance by preventing IDs from your database from being unnecessarily copied down to the Campaign server for processing. With in-database processing turned on, processing tasks such as sorting, joining, and merging of data are, whenever possible, done on the database server rather than on the Campaign server, and output cells of processes are stored in temporary tables on the database server.

Depending on the logic required, some functions will still be performed on the Campaign server, even with in-database processing turned on. For example, when Campaign calculates a derived field, it first evaluates the derived field formula to see if any part of the calculation can be performed using SQL. If simple SQL statements can be used to perform the calculation, then the calculation can be done "in-database". If not, then temporary tables are created on the Campaign server to handle the calculations and persist the results from process to process within a flowchart.

**Important:** In-database processing cannot be done if you have specified any limitations on the output cell size or if temporary tables are disabled for the process.

Processing of custom macros consisting of raw SQL statements is performed in-database, with the following limitations:
- All raw SQL custom macros must begin with `select` and must contain exactly one `from` in the rest of the text.
- For databases that support only insert into <TempTable> syntax, you must have at least one base table mapped to the same data source at the same audience

level as the raw SQL custom macro. If the fields selected by the raw SQL custom macro are too large for the fields of the temp table, a runtime error will occur.

**Important:** If you are using raw SQL with in-database processing, you must code the raw SQL to join with the temp table from the upstream process, otherwise, the results will not be scoped by the results from the upstream process.

## Turning in-database processing on or off

The in-database processing setting can be set:
- for each flowchart
- globally, for the entire system

A best practice for this option is to turn off the global setting, and set the option at the flowchart level.

## To turn in-database processing on or off for a flowchart

The in-database processing option for an individual flowchart overrides the global setting.
1. From a flowchart page in **Edit** mode, click the **Admin** icon and select **Advanced Settings**.
   The Advanced Settings window appears.
2. Select the **Use In-DB Optimization during Flowchart Run** check box.
3. Click **OK**.

When you save and run the flowchart, in-database processing will be used wherever possible.

## To turn in-database processing on or off globally

To turn on in-database processing or turn off globally, set the `Campaign > partitions > partition[n] > server > optimization > useInDbOptimization` property on the Configuration page to the appropriate value (`TRUE` or `FALSE`).

For information about using the Configuration page, see the *IBM Unica Marketing Platform Administrator's Guide*.

## Creating queries in processes

When you configure particular processes, you can use queries to return specific data from your data sources. Campaign makes it easy for you to create queries using any of the following methods:
- "To create a query with Point & Click" on page 94
- "To create a query with Text Builder" on page 95
- "To create a query using Query Helper" on page 96
- "Creating queries using SQL" on page 96

## How queries are evaluated in Campaign processes

Queries in Campaign processes are evaluated left to right using mathematical rules.

For example, the following statement:

```
[UserVar.1] < PDF < [UserVar.2]
```

is evaluated as:

```
([UserVar.1] < PDF) < [UserVar.2]
```

That is, the first part of the statement **([UserVar.1] < PDF)** is evaluated as true or false (1 or 0), and the result is passed to the second statement:

```
[1 | 0 ] < [UserVar.2]
```

For the example to be evaluated as PDF greater than [UserVar.1] and less than [UserVar.2], you would need to construct the following query:

```
[UserVar.1] < PDF AND PDF < [UserVar.2]
```

This statement is equivalent to the following:

```
([UserVar.1] < PDF) AND (PDF < [UserVar.2])
```

## To create a query with Point & Click

These instructions describe how to create a new query using the **Point & Click** feature in the process configuration dialog.

To edit an existing query, double-click any item in the query to select another value. Selecting a new item from the **Select Based On** drop-down list will remove the existing query.

1. In a process that requires queries, such as Segment, Select, or Extract, access the process configuration dialog containing the query text box.

    By default, the **Point & Click** query builder is displayed. Any existing queries are shown in the query text box.

2. As you click in each of the columns in the left text area (FieldName, Oper., Value, And/Or), the options that you can select for the selected column appear in the box on the right.

    - Click the **Field Name** column to see the list of **Available Fields**, including IBM Unica Campaign Generated Fields. You can also click **Derived Fields**... to create derived fields.
    - Click the **Oper.** column to see the list of Operators;
    - Click the **Value** column to see the possible values based on your selection from **Field Name**;
    - Click the **And/Or** column to see AND and OR as Operators. Use this column to create multiple statements;
    - Select the entire expression to see the actions you can perform For Selected Expressions: Add, Remove, Clear all, Move Up, Move Down, Insert, and Delete.

3. Create your query by clicking in each column cell in the left text area, then double-clicking to make your selection from the list on the right. You can also click once, then click **<-Use** to move it to the left text box.

    **Note:** When you select a table field, you can click **Profile** to review the values of the selected field.

4. To check the syntax of the query, click **Check Syntax**. Checking the syntax of your query does not put any load on the database server.

   Campaign displays a confirmation window that displays any found errors. Click **OK**.
5. To see the results of running the query, click **Test Query**.

   **Important:** Global suppressions and cell size limits are not applied in Test Query counts. Queries might also return non-normalized data. To obtain an accurate result count, perform a test run of the process.

   A progress bar is displayed while the query is being tested. Click **Cancel** to stop the testing.

   When testing is complete, Campaign displays a confirmation window that displays the number of rows the query returned. (This number might be different when the campaign is run.)
6. When you finish creating your query, click **OK**.

## To create a query with Text Builder

These instructions describe how to create a new query using the Text Builder feature in the process configuration dialog.

To edit an existing query, edit the text of the query directly in the query text box.

1. In a process that requires queries, such as Segment, Select, or Extract, access the process configuration dialog containing the query text box.

   By default, the **Point & Click** query builder is displayed. Any existing queries are shown in the query text box.
2. Click **Text Builder**.

   The **Point and Click** query columns are replaced with a blank text box.
3. Choose an Input data source, and a data source to query from the **Select Based On** drop-down list.

   The list of **Available Fields** is displayed based on your **Select Based On** choice.
4. Create your query by:
   - Selecting the field or table name(s) from the **Available Fields** list and double-clicking to enter them in the query text box. You can also click once then click **<-Use** to move it to the query text box.
   - Entering the required operators and values. To see the values of a selected field, you can click **Profile**.

   **Note:** Although you can enter field and table names directly in the query text box, selecting them from the list helps to avoid syntax errors.
5. To check the syntax of the query, click **Check Syntax**.

   Campaign displays a confirmation window that displays any found errors. Click **OK**

   Checking the syntax of your query does not put any load on the database server.
6. If you want to see the results of running the query, click **Test Query**.

   **Important:** Global suppressions and cell size limits are not applied in Test Query counts. Queries might also return non-normalized data. To obtain an accurate result count, perform a test run of the process.

A progress bar is displayed while the query is being tested. Click **Cancel** to stop the testing.

When testing is complete, Campaign displays a confirmation window that displays the number of rows the query returned. (This number might be different when the campaign is run.)

7. When you have finished creating your query, click **OK**.

The process configuration box closes and you are returned to the flowchart page in **Edit** mode.

## To create a query using Query Helper

The **Query Helper** provides selectable operators and functions that you can combine with available fields to build a query. The **Query Helper** can help you construct queries in Campaign's macro language or with custom macros.

1. In a process that requires queries, such as Segment, Select, or Extract, access the process configuration dialog containing the query text box.

By default, the **Point & Click** query builder is displayed. Any existing queries are shown in the query text box.

2. Click **Text Builder**.

The **Point and Click** query columns are replaced with a blank text box. The **Query Helper** button is enabled.

3. Click **Query Helper**.

The Query Helper appears below the query text box. The Query Helper contains a set of buttons for inserting commonly used operators, and a complete list of macros.

4. Create your query by:

   a. Selecting the macro you want to use from the list of macros in the **Query Helper** and double-clicking to enter it in the query text box. When you select a macro, the **Query Helper** displays a brief description and the syntax of the selected macro.

   **Note:** If you select a custom macro, the description and syntax were created by the person who wrote the macro.

   b. Entering the required operators by typing or using the Query Helper buttons.

   **Note:** Although you can enter field and table names directly in the query text box, selecting them from the list helps to avoid syntax errors.

5. Continue creating your query using the **Text Builder**.

6. When you have finished creating your query, click **Close**.

The Query Helper closes.

7. Click **OK** to close the process configuration dialog.

## Creating queries using SQL

If you are an experienced SQL user, you can write your own SQL query or use SQL queries created in other applications by copying and pasting them. Writing raw SQL is an advanced function of Campaign; users are responsible for correct syntax and query results.

**Important:** Getting correct results when using raw SQL in a Select process (that is, the correct list of audience IDs) requires the use of the `<TempTable>` token when

in-DB optimization is enabled and there is an input cell to the Select process. In addition, to significantly improve performance when Campaign processes very large tables, use the `<TempTable>` token even when not using in-DB optimization.

A SQL query must return a list of **only** the unique IDs as defined by the key on a base table.

Your query should use the following syntax:

`SELECT DISTINCT(<key1> [<key2>,...]) FROM <table> WHERE <condition> ORDERBY <unique_id>`

The query requests the database to perform the sorting and data deduplication. If you omit either the `DISTINCT` or `ORDERBY` clause, Campaign will still sort and deduplicate the data on the application server, so you will still receive the correct results, but the performance will likely be slower.

- If you have chosen to **Select All Customer IDs**, you can write raw SQL commands to be run against records in a specified database before or after the **Select** process is executed.
- If you have chosen to apply select criteria to the customer IDs, in addition to the above, you can also enable the use of raw SQL in the **Query Builder** when creating your select criteria. Otherwise, you can only use **Unica Expressions** and Custom Macros.

## Building raw SQL statements in Campaign

In processes which require queries, click **Advanced** on the query editing window to access the **Advanced Settings** features. The actual features will vary among processes.

For example, in the Select process, you can use the **Advanced Settings** to create a query using raw SQL or to execute pre- and/or post-processing SQL commands.

The Advanced Settings window includes two panes:
- **Pre-processing —** enter raw SQL to be processed before the query executes
- **Post-processing —** enter raw SQL to be processed after the query executes

This feature allows you to incorporate SQL procedures as part of the process run, and is useful in employing Campaign in efforts including ETL, routine mart updates, in-line performance tuning, and security functions.

You can use pre- and post-processing SQL statements in **Advanced Settings** to:
- Run stored procedures in the database
- Create, drop, and recreate tables and indexes
- Grant or change privileges to other users or groups
- Organize multi-step database commands
- Run complex database routines, without having to use external scripts to connect to the database

The SQL statements are run in the order in which they appear.
- Pre-Processing SQL statements are run before the query executes.
- Post-Processing SQL statements are run after the query executes.

They can be used with either raw SQL or standard processing in the Select process query.

### Raw SQL queries and in-database processing

For details about in-database processing with raw SQL queries, see "Choosing in-database processing for processes" on page 92.

### Using the TempTable and OutputTempTable tokens in raw SQL queries

When you use a raw SQL query in a Select process with an input cell, behavior in Campaign is different depending on whether in-DB optimization is enabled or disabled.

When in-DB optimization is disabled, the list of IDs from the raw SQL query is automatically matched against the ID list from the incoming cell so that the resulting list of IDs is a subset of the cell as expected. However, when in-DB optimization is enabled, Campaign expects the ID list generated from the Select process to be the final list, and does not automatically match this list against the ID list of any incoming cell. Therefore, when in-DB optimization is enabled, it is critical that the raw SQL query written for an intermediate Select process (in other words, a Select process with an input cell) uses the <TempTable> token to properly join against the incoming cell. Not only does this ensure correct results, joining against the input cell also improves performance by preventing extraneous processing for audience IDs that are not in the input cell.

**Note:** For best performance, use the <TempTable> token even when not using in-DB optimization. Using the <TempTable> token can significantly improve performance, especially when Campaign processes very large tables.

In addition, using the <OutputTempTable> token maintains in-DB optimization and prevents the audience IDs from being retrieved from the database back to the Campaign server.

**Example: Using the TempTable and OutputTempTable tokens:** Assume that you have a Select1 process that selects 10,000 customers who are "Gold" customers (for example, Indiv.AcctType = 'Gold'). You then connect Select1 to a second Select process ("Select2") using a raw SQL query:

```
Select p.CustID from Indiv p, <TempTable> where p.CustID =
<TempTable>.CustID group by p.CustID having sum(p.PurchAmt) > 500
```

This example selects customers the sum of whose purchases exceeds $500 and who are in the input cell (in other words, customers who have a "Gold" account type).

In contrast, a raw SQL query omitting the <TempTable> token and join:

```
Select p.CustID from Purchases p group by p.CustID having sum(p.PurchAmt) >
500
```

first calculates the sum of purchases for all customers in the Purchases table (which could be millions of customers) and then selects all customers the sum of whose purchases exceed $500, regardless of whether they are "Gold" customers or not.

Therefore, for best performance, even if in-DB optimization is disabled, write your raw SQL queries using the <TempTable> token when there is an input cell.

For simplicity, this example does not use the <OutputTempTable> token, but to maintain in-DB optimization and prevent the audience IDs from being retrieved from the database back to the Campaign server, you must include the <OutputTempTable> token in your raw SQL query. For example:

```
Create table <OutputTempTable> as Select p.CustID from Purchases p,
<TempTable> where p.CustID = <TempTable>.CustID group by p.CustID having
sum(p.PurchAmt) > 500
```

## Referencing Extract tables in raw SQL queries

You can reference an Extract table in downstream processes via raw SQL using the <Extract> token. Use this token to specify subsets of data for subsequent processing, which can improve performance when working with large tables.

The following example queries an Extract table to select the customer IDs of all customers whose account balance exceeds $1,000.

```
Select p.CUSTOMERID from USER_TABLE p, <Extract> where p.CUSTOMERID =
<Extract>.CUSTOMERID group by p.CUSTOMERID having sum(p.BALANCE) > 1000
```

For flowcharts containing multiple Extract processes, the <Extract> token always refers to the latest available Extract table.

**Note:** After a Merge, the <Extract> token may or may not be valid. Test run the flowchart to determine if the token works as expected.

## To create a raw SQL query in the SQL Text Entry Area

1. Enable the **Select records with** option in the Source tab of the Select process.
2. Click **Advanced**.

   The Advanced Settings window appears.
3. Enable **Use Raw SQL for Record Selection**.
4. Select the data source to query from the **Database** drop-down list.
5. Select the audience to target from the **Audience Level** drop-down list.
6. Click **OK** to close the Advanced Settings window.
7. Click inside the SQL text entry area.
8. Build a query by:
   - Entering raw SQL in the SQL text entry pane
   - Using the **Query Helper**
   - Using **Point & Click**

     **Note:** If you click **Point & Click**, you will return to building a non-SQL query expression.
9. (Optional) Click **Test Query**.

   **Important:** Global suppressions and cell size limits are not applied in Test Query counts. Queries might also return non-normalized data. To obtain an accurate result count, perform a test run of the process.
10. When you have finished building and testing your query, click **OK** to close the window and save your configuration.

## To pass multiple commands in a raw SQL statement

You can pass multiple commands in a raw SQL statement.

If your database allows multiple commands to be passed, you can enter as many valid SQL commands as you need, with the following rules:

- Commands are separated with the appropriate delimiter;
- The last command must be a select command;
- This select command must select all the relevant fields required in defining your audience level in the same order the audience level is defined;
- No other select statements are used.

1. Enable the **Select records with** option in the Source tab of the Select process.
2. Click **Advanced**.

   The Advanced Settings window appears.
3. Click to enable **Use Raw SQL**.

   This activates raw SQL, a feature that passes your exact query syntax to the database.
4. Select the database to use and the desired audience level.

   Click **OK**.
5. Enter your SQL commands in the **Select records with** text box.

   Click **OK**.

### To specify pre- or post-processing SQL statements

1. From the **Source** tab of a Select process, click **Advanced**.

   The Advanced Settings window appears.
2. To enter a pre-processing raw SQL statement, double-click inside the **Pre-Processing** field and enter the SQL statement you want to run before the process runs.
3. Next, click in the **Database** field on that line, and select the name of the database on which you want to run this statement.

   **Note:** The **Database** drop-down list displays all of the available databases (those for which a data source category has been configured on the Configuration page in Marketing Platform). If your database does not appear in this drop-down list, contact your Campaign system administrator.
4. Click to select the **SQL** check box if you want to view only SQL functions in the list pane. Click again to clear and see the full list of available functions and operators.

   **Note:** If you already enabled the **Use Raw SQL** option on the Advanced Settings window, the **SQL** option in the Query Helper is enabled. This will hide Campaign macro functions, so that only SQL operators and functions are displayed.

## Profiling fields

The **Profile** feature lets you preview a list of distinct values and their frequency of occurrence for a selected field. You can profile any field that is available in any process where the **Profile** button appears, such as the **Segment by Field** drop-down list in the Segment process, or **Available Fields** or **Candidate Fields** lists in other process configuration dialogs. Only records in the current cell are included in the count, unless the counts have been pre-computed.

**Note:** You must have the appropriate permissions to profile fields. Ask your system administrator if you have questions about your access to this feature.

# To profile a field

Campaign automatically profiles a field when you select it in a field that has a corresponding **Profile** button. You can profile any field in any mapped data source.

In the configuration window of a process where the Profile button appears, select the field that you want to profile. You can also profile derived fields.
The Profile Selected Field window appears.

Campaign profiles the data in the selected field. The categories and frequency counts dynamically update as profiling progresses.

**Note:** You should wait until profiling is finished before using profiling results, to ensure that all categories have been processed and counts are complete.

When profiling is complete, the Profile Selected Field window displays:
- The list of values in the selected field, displayed in the **Category** column, and the corresponding **Count** of IDs with that value.

  **Note:** The default maximum number of categories (distinct bins of values) that can be displayed is 25. Campaign automatically displays values in the maximum number of categories, grouping them to create approximately equal-sized segments. You can change the maximum number of categories.
- The **Statistics** pane on the right displays the total count of IDs and other details about the data for that field, including:
  - The number of NULL values found
  - The total number of categories, or values, for that field
  - Statistical values for the data including the mean, standard deviation, minimum, and maximum values.

    **Note: Mean**, **Stdev.**, **Min.**, and **Max.** are not available for ASCII text fields. When you profile text fields, these values will appear as all zeros.

# Restricting input for profiling

When Campaign profiles a field, it creates only those segments that are available in the input to the process in which you are performing profiling.

In other words, if you restrict input to the Segment process, then profile that data based on that same field on which it was restricted, the Profile results can only display segments that were available in the restricted input.

For example, in a Segment process, if you use a query to select only those IDs associated with Credit Score < 5 out of a list of 10 potential credit score levels, then if you profile the same field (in this example, Behavior.CreditScore), then Campaign can only display the four segments corresponding to those four remaining credit score levels.

The following examples compare an unrestricted profile (where **Input Cell** on the Profile Selected Field window is set to **None**), and a restricted profile (where the **Input Cell** is set to Select1.out).

On the Profile Selected Field window, the **Input Cell** is set to None. When profiling is performed, all 10 distinct values in the field Behavior.CreditScore are displayed.

On the Profile Selected Field window, the **Input Cell** is set to Select1.out, the output cell from a select process providing input into the current process which is restricted to credit scores from 1 to 4.

When profiling is performed, only four categories are displayed, each corresponding to one of the allowed values in the input cell.

## Disallowing profiling

Real-time profiling allows you to view and use characteristics of a selected field. It can affect performance, however, when working with large databases. For this reason, Campaign allows this option to be disabled.

When real-time profiling is disabled, and you click **Profile**, the Profile Selected Field window appears, but a message is displayed at the bottom of the window to indicate that real-time profiling is disallowed.

If profiling is disallowed and the field is not configured to be pre-computed, the Profile Selected Field window indicates that no data is available, no counts or categories are displayed, and all **Statistics** counts are zero.

Where pre-computed values are available for a field, when profiling is performed, these values are displayed in place of the disallowed "live" values. The Profile Selected Field window indicates that the data source is "Imported," and displays the last updated date and time of the pre-computed values.

For more information about disallowing real-time profiling, see the *IBM Unica Campaign Administrator's Guide*.

# Setting profiling options

You can affect how the Profile feature performs by:
- "Restricting input for profiling" on page 101
- "Disallowing profiling" on page 103

In addition, you can set these options in the Profiling Options window:
- "Specifying the maximum number of profile segments"
- "Profiling by meta type"

## To access the Profiling Options window

1. From any process configuration dialog in which the Profile option is available, select a field for profiling, or click **Profile**.

   The Profile Selected Field window appears.
2. From the Profile Selected Field window, click Options.

   The Profiling Options window appears.

## Specifying the maximum number of profile segments

When you **Profile** a field, Campaign automatically creates up to the maximum number of segments set in the Profiling Options window. By default, a maximum of 25 segments are allowed.

You can change the maximum number of segments to be used for profiling. After this setting is changed, the new setting is used for all subsequent profiles until it is reset.

**Note:** If the number of distinct values in the field you are profiling exceeds the maximum allowed number of segments, Profile will group values together into approximately equal sized segments to prevent exceeding the maximum number of segments.

## To set the maximum number of segments for profiling

1. On the Profile Selected Field window, click **Options**.

   The Profile Options window appears.
2. In the **Number of Segments** field, enter an integer to indicate the maximum number of segments into which you want the field values grouped. By default, this value is 25.
3. Click **OK** to save your settings and return to the Profile Selected Field window.

The profile is recomputed using the new maximum number of segments setting.

## Profiling by meta type

You can specify whether metadata type information should be used when profiling by enabling or disabling the **Profile By Meta Type** check box on the Profiling Options window.

**Profile By Meta Type** enabled is usually the desired behavior. Data types associated with fields containing dates, money, telephone numbers, and other numeric information are correctly sorted and binned using the metadata information, rather than sorting purely based on ASCII text.

For example, the following table shows a date field sorted using meta type information and without. Profiling done without using meta type produces results sorted purely numerically, while profiling done using meta type recognizes that the data are formatted as dates, and sorts them accordingly.

| Profiled by Meta Type | Profiled Without using Meta Type |
| --- | --- |
| 25-DEC-2006 | 20-FEB-2007 |
| 20-FEB-2007 | 20-MAR-2007 |
| 20-MAR-2007 | 25-DEC-2006 |

## Refreshing a profile count

You might want to refresh the profile count when something occurs that might change the results (for example, when new values are added to a field), or whenever the database table might have been updated.

To refresh the profile results for a field from the Profile Selected Field window, click **Recompute**.

**Note:** When you first profile a field from a dimension table, Campaign returns counts that match the field in the dimension table. When you click **Recompute** to refresh the profile results, Campaign returns counts from the resulting join with the base table that is linked to the dimension table. If you want to profile a dimension table field without joining to a base table, map the dimension table as a base table.

## To insert a profile category into a query

While building a query expression in a process configuration dialog, you can insert a field value into your query expression.

1. Perform profiling on the selected field.
2. When profiling is finished, from the Profile Selected Field window, double-click a category to insert that value at the current cursor location in the query text box.

   **Note:** If you do not see the value you want, this might be due to multiple values being grouped together into a profile segment. If you set the maximum number of profile segments to a number greater than the number of categories (reported in the Profile Selected Field window), each field value will be listed as a separate category. This makes it possible to access all of the existing categories.

## To print the results of a profile

1. Click **Print** from the Profile Selected Field window.

   The Page Setup page appears, from which you can specify the printer and printing options.
2. Click **OK** to confirm sending the print job to the printer.

## To export profile data

After performing profiling on a field, you can export the profile data to a delimited text file.

1. In the Profile Selected Field window, click **Export**.

**Note:** The **Export** button is available only when profiling is finished.

The Export Report Data window appears.

2. (Optional) Select the **Include Column Labels** check box to include column heads in your exported data.

3. Click **Export**.

   The File Download window appears.

4. Click **Open** to open the profile data, or click **Save** to specify a location for saving the file.

   If you clicked Open, the profile data is displayed in a spreadsheet window.

   If you clicked Save, the **Save As** window appears.

5. If you clicked Save, in the Save As window, navigate to the location where you want the export file to be saved, and enter the file name that you want to use for the exported file. By default, the name of the export file is Campaign.xls.

6. Click **OK**.

   The data is exported to the file you specified. The Download Complete window appears.

# Specifying an output file or table for contact logging

Contact processes such as Mail List or Call List can write results to:

- system tables
- a new or existing external file that you specify
- an unmapped database table

## To specify an output file for contact logging

1. In a flowchart in **Edit** mode, from the process configuration dialog, select **File** from the **Export To** or **Log To** drop-down list. The **File** option usually appears at the bottom of the list, following the list of mapped tables.

   The Specify Output File window appears.

2. Select the type of file to which you want to write:

   - **Flat file with data dictionary** to create a new fixed-width file and new data dictionary file.
   - **Flat file based on existing data dictionary** to create a new fixed-width file and select an existing data dictionary file.
   - **Delimited file** to create a new file in which field values are delimited by a tab, comma, or other character.

3. If you selected **Delimited file**:

   - Select the **Tab**, **Comma**, or **Other** option. If you selected **Other**, enter the character to use as the delimiter in the **Other** field.
   - Check **Include Labels in Top Row** if you want the first row of the file to contain labels for each column of data.

4. Enter the complete path and name of the file in the **File Name** field. You can also click **Browse** to navigate to a directory and select an existing file.

   **Note:** You can use user variables in the output file name. For example, if you specify MyFile<UserVar.*a*>.txt as the table name, and the value of the user variable "*a*" is "ABC" at the time that the process is run, the output is written to a file named MyFileABC.txt. Be aware that you must set the Initial Value and the Current Value of the user variable before executing the flowchart.

5. Campaign automatically fills in the **Data Dictionary** field with a .dct file with the same name and in the same location as the file you entered.

6. If you want to use a different data dictionary, or to rename the data dictionary, enter the complete path and name of the data dictionary file in the **Data Dictionary** field.

7. Click **OK**.

   The Specify Output File window closes. You are returned to the process configuration dialog, and the **Export/Log to** field displays the path and file name you entered.

## To specify a database table for contact logging

1. In the process configuration dialog, select **New Table** or **Database Table** from the **Export To** or **Log To** drop-down list. This option usually appears at the bottom of the list, following the list of mapped tables.

   The Specify Database Table window appears.

2. Specify the table name.

   **Note:** You can use user variables in the table name. For example, if you specify MyTable<UserVar.*a*> as the table name, and the value of the user variable "*a*" is "ABC" at the time that the process is run, the output is written to a table named MyTableABC. You must set the Initial Value and the Current Value of the user variable before executing the flowchart.

3. Select the database name from the drop-down list.

4. Click **OK**.

   The Specify Database Table window closes. You are returned to the process configuration dialog, and the **Export/Log to** field displays the name of the database table you entered.

5. If a table of the name you specified exists, choose an option for writing the output data:

   • Append to Existing Data — if you choose this option, the existing table must have a schema compatible with the output data. In other words, field names and field types must match, and field sizes must allow for the output data to be written.

   • Replace All Records — if you choose this option, existing rows in the table are replaced with the new output rows.

## Changing the seed for random selection

The random seed represents the starting point that Campaign uses to select records randomly. If you are selecting records randomly, you might want to change the random seed in situations such as the following:

• You have the same number of records in the same sequence, and using the same seed value each time you run this process results in records being created into the same samples.

• Your current random sample produces highly skewed results (for example, if all males in your data fall into one group and all females into another).

## To change the random seed for selecting records

On the **Cell Size Limit** tab of the process configuration dialog, change the starting point for the random selection in one of these ways:

- Enter a numeric value in the **Random Seed** text box; or
- Click **Pick** to have Campaign randomly select a new seed value for you.

## Skipping duplicate IDs in process output

The Extract, Call List, Mail List, and Snapshot processes allow you to specify how you want to treat duplicate IDs in the process output. The default is to allow duplicate IDs in the output. Follow these steps specify that duplicate IDs are excluded from the output.

1. From the configuration window of the process, click **More**.

   You see the **Advanced Settings** window.

   a. To specify that any records with duplicate IDs are skipped, select the **Skip Records with Duplicate IDs** check box, and choose the criteria that Campaign will use to decide which record to retain if duplicate IDs are returned. For example, you can select MaxOf and Household_Income to specify that when duplicate IDs are returned, Campaign exports only the ID with the highest household income.

      **Note:** This option only removes duplicates within the same input field. Your data can still contain duplicate IDs if the same ID appears in multiple fields. If you want to remove all duplicate IDs, you must use a Merge or Segment process upstream of the Extract process to purge duplicate IDs or create mutually exclusive segments.

2. Click **OK** to close the Advanced Settings window.

   Your duplicate ID settings are displayed on the configuration window.

## To use the Calendar tool

The Calendar tool is available for fields throughout Campaign where you can enter a date value into a field.

1. Click the ellipsis button next to the field requiring a date value.

   The Calendar tool appears. The current date is selected by default.

2. Click the date on the displayed month to select it, or:
   - Change the month using the **Month** drop-down list
   - Change the year using the up and down arrows

3. Click **OK** to enter the specified date into the field and close the Calendar window.

# Chapter 7. Offers

Offers are specific marketing communications that you send to particular groups of people, using one or more channels. They can be simple or complex. For example, a simple offer from an online retailer could consist of free shipping on all online purchases made in the month of April. A more complex offer could consist of a credit card from a financial institution, with a personalized combination of artwork, introductory rate, and expiration date that varies based on the recipient's credit rating and region.

In Campaign, you create offers that can be used in one or more campaigns.

Offers are re-usable:
- in different campaigns;
- at different points in time;
- for different groups of people (cells);
- as different "versions" by varying the offer's parameterized fields.

Once an offer has been used, it cannot be deleted, but it can be retired.

Retired offers can no longer be assigned, and any assigned offers that have been retired will no longer be given out. Retired offers are still visible (although greyed out) in the offer hierarchy, and are still available for reporting and response tracking.

**Note:** Offer names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215

Offers are identified with unique system-assigned offer codes based on a format that your company has specified. You can override or regenerate offer codes (depending on your security permissions), but if you do so, the uniqueness of the new offer code is no longer checked by Campaign. If you create a non-unique offer code and use the offer code for response tracking, this might result in inaccurate tracking results.

For more details about offer codes, see "Unique Code Administration" in the *Campaign Administrator's Guide*.

## Managing offers when Marketing Operations is integrated with Campaign

If your IBM Unica Campaign environment is integrated with IBM Unica Marketing Operations, there are two options for offer management.
- If your system is configured so that offers are managed through the Marketing Operations version of the feature, then you use the **Offers** option from the **Operations** menu. For information about creating offers in this way, see the *IBM Unica Marketing Operations and Campaign Integration Guide*.
- If your system is configured so that offers are managed through the Campaign version of the feature, then you use the **Offers** option from the **Campaign** menu.

Ask your system administrator which offer management option is configured on your system.

## Offer attributes

Offer attributes are the fields that define an offer. Offer Name, Description, and Channel are examples of an offer's attributes. Some attributes are specific to a type of offer. For example, interest rate might be an attribute of a credit card offer, but not of a "free shipping" offer.

There are three types of offer attribute:
- **Basic** — the minimum set of fields required to define an offer: the offer name, the unique offer code, an offer description, and related products.
- **Standard** — optional, pre-defined fields for defining an offer, for example, channel can be an optional attribute of an offer.
- **Custom** — additional fields custom-created for your organization's definitions of offers, such as department, sponsor, promotional and go-to interest rates, stock-keeping unit numbers (SKUs), and so on. Custom attributes can be added to offer templates to further define an offer, or for offer analysis (for example, you can group offers by custom attribute for roll-up analysis). For more details about custom attributes, see "Custom Attributes" in the *Campaign Administrator's Guide*.

When you define offer attributes in an offer template, each attribute can be defined as either *static* or *parameterized*. The same offer attribute (for example, channel), could be static in one offer template, but parameterized in another.
- **Static attributes** — these are offer attributes whose values do not change when you create a different version of the offer. For example, the channel, offer code, offer name, and description are static offer attributes.
- **Hidden static attributes** — some static attributes, although part of the offer definition, can be designed to be invisible to users when they use the offer template to create offers. Hidden attributes therefore cannot be edited, but they can be tracked and reported on in the same way as other offer attributes. For example, a hidden static attribute could be the cost of the offer (the cost to your organization of administering the offer). You cannot change the value of this attribute, but it can be used in searches (for example, if you want to find all offers that cost less than $1.00 to administer), or in reporting (for example, in performance ROI analysis reports).
- **Parameterized attributes** — these are offer attributes whose values you can fill in at offer assignment time by entering a value, choosing an option from a pre-defined drop-down list, specifying the value by using a field in the database, or by calculating values in derived fields. Any standard or custom offer attribute can be set up to be a parameter by your administrators when they create offer templates.

Parameterized attributes in offer templates have default values that you can override when the offer is created and when it is assigned. For example, the introductory interest rate for a credit card offer could be parameterized in its offer template so that users can select 5.99%, 8.99%, or 12.99% as the default interest rate from a drop-down list when they create an offer using this template. When the offer is subsequently used in a flowchart and assigned to a cell, users can then change the interest rate to a different value if necessary.

# Offer versions

**Note:** The term "offer versions" as used starting in Campaign versions 7.x does not have the same meaning as "offer versions" in earlier Campaign releases (5.1 to 6.x). Offer versions do not appear in the offer tree hierarchy, and do not have version names or codes. To uniquely identify specific instances of offer usage, you should use treatment codes.

An offer version is created each time you vary the parameterized attributes of an offer to create a unique combination.

For example, you can vary the following attributes in a credit card offer:
* The artwork (lighthouse, kittens, or racing cars);
* The introductory rates (5.99%, 8.99%, or 12.99%);
* The offer valid dates (valid during the month of January, June, or September).

Thus, a card with the lighthouse image, 5.99% introductory rate and offer valid from September 1–31, 2006, is a different version of the offer than a card with the lighthouse image, 5.99% introductory rate and offer valid from January 1–31, 2007.

# Offer templates

You create offers using the offer templates available to you in Campaign. These templates will already have been created by a system or offers administrator. Each offer template has a security policy that determines who can access and use the template; you can only see offer templates to which you have access.

Using an appropriate template to create a new offer streamlines your offer creation process. For example, if you create a credit card offer using a template that has been designed for credit card offers, you will be completing only fields that are relevant for credit card offers.

Your administrator can also create drop-down lists of values that you can choose when you are filling in the offer information, saving time in data lookup and reducing data entry errors. Offer attributes can be designed by your administrator to have drop-down lists to which you are allowed to add new items when you use the attribute in an offer. If new values are allowed, you will see an **Add** button beside the offer attribute. When you add new values to such an attribute, you can also delete the values you have added; you cannot delete values that you did not add.

Offer templates define:
* the offer code format;
* the treatment code format;
* offer attributes and their display order;
* for each offer attribute where it is static, hidden, or parameterized;
* default values for offer attributes.

New offer templates can be added at any time, and there is no limit to the number of templates defined in Campaign. The template is an inherent attribute of the offers created from it, so you can search for offers using the template as a search criterion.

**Note:** Offer templates cannot be deleted, but they can be retired by administrators to prevent further use. Retired offer templates appear greyed out in the list of offer templates, and they cannot be used for creating new offers.

For details about managing offer templates, see "Offer Template Administration" in the *Campaign Administrator's Guide*.

## About offer lists

Offer lists are groupings of offers that you can create in Campaign to facilitate assigning multiple or a possibly changing set of offers over time.

The same offer can exist in more than one offer list. Offer lists appear in the same hierarchy as offers, but are identified by icons. Single offers have a single sheet icon with dollar sign; static offer lists have a multiple sheets icon with a dollar sign, and smart offer lists have the multiple sheets icon with a dollar sign and magnifying glass.

Like an offer, once an offer list has been used, it cannot be deleted, but it can be retired.

Retired offer lists can no longer be assigned, and any assigned offer lists that have been retired will no longer be given out.

There are two types of offer lists:
- "Static offer lists"
- "Smart offer lists"

**Note:** Offer list names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

### Static offer lists

Static offer lists are pre-defined lists of offers whose contents do not change unless you explicitly edit the list. A limitation of static offer lists is that default values are used for any parameterized offer attributes.

Generally you use static offer lists to repeatedly reuse a specific, fixed set of offers. For example, if you have 5 each of RFM (Recency, Frequency, Monetary) segments, giving you 125 cells, and you want to assign the same offers to each cell, you can create a single set of offers in a static offer list, and assign that offer list to all 125 cells. The same type of reusability applies across flowcharts and campaigns.

### Smart offer lists

Smart offer lists are dynamic lists of offers which can resolve to different sets of results each time a smart list is used. A smart offer list is specified by a query which can be based on offer attributes, offer locations (folders or subfolders), offer owner, and so on.

Generally you use smart offer lists for periodically recurring campaigns. You can set up a cell to receive a smart offer list and then change the contents of the smart offer list without having to modify the flowchart. For example, if you set up a smart offer list to be the contents of a particular folder, then you can simply add or remove offers to and from that folder to modify the offers given out each time the campaign is run.

A further example for using smart offer lists involves setting up the smart offer list to automatically return the offers you want to give out. If you want to give your "high-value customer" cell the "best credit card offer" available, you can set up a smart offer list that includes all credit card offers, sorted by the lowest interest rate and with maximum size set to 1. The lowest interest rate credit card offer available at the time(s) that the flowchart contact process is run is automatically found and given to the high-value cell.

## Security and offer lists

Object-level security applies to offer lists, based on the folders in which your offer lists, and the offers included in your lists, reside.

When you create a static offer list, you can only add offers to which you have access. However, anyone with permission to access an offer list is automatically granted permissions to access the offers included in that list. Therefore, anyone who can access your list can also use that offer list and all the offers within it, even if they would not normally have access to those offers based on their security permissions.

Similarly, users who can access a folder containing a smart offer list can use that smart offer list. They will get the same result as anyone else running that offer list, even if they would not normally have access to particular offers (for example in another division's folders).

## Treatments

Treatments are unique combinations of a cell and an offer version at a particular point in time. Because they enable you to track responses in a very specific way, using treatment codes for response tracking is a best practice.

Treatments are automatically created when you run a flowchart with contact processes (Call List or Mail List) that have been associated with offers. Each treatment is uniquely identified by a system-generated treatment code whose format is specified in the offer template(s) from which the offer(s) were produced. Treatment codes cannot be overridden by users.

Each time a contact process is run (except in test mode), Campaign records the following details:
- The offer version(s) assigned in the contact process;
- The cell(s) to which the offers are assigned;
- The treatment code for each unique combination of offer version, cell, and date/time;
- The contact process run date.

Running the same contact process twice (in production runs) creates two treatment instances, each with a unique treatment code. This enables you to track responses in a very specific way, back to an exact contact instance. For example, you could run the same promotion on January 15 as you ran on February 15, and if you used the treatment codes for tracking, people responding to the February 15 mailing would be distinguishable from people responding to the January 15 mailing by their treatment codes, even if they were targeted by both promotions.

Treatment codes are not available prior to flowchart runs because they are generated only at run-time, and therefore are not suitable for pre-printed codes requirements. However, they can be output as Campaign-generated fields for tracking or on-demand print purposes.

## Control groups

When you plan an offer, you should consider whether you want to use holdout control groups for cells assigned that offer. Control groups are non-contact groups that you can use to compare the "lift" or difference in response from an active target cell that received an offer.

Controls are applied at the cell level in Campaign. When you assign offers to cells, either in a contact process in a flowchart or from a target cell spreadsheet, you can optionally specify one control cell for each target cell.

### Association of control cells to target cells

A single control cell can be used as the control for multiple target cells, but each target cell may only have a single control cell, where the cell is defined by its cellID. When a single control cell is used in multiple contact processes, you must configure the control cell relationship for the target cell the same way in each contact process. If different control relationships are required, create a copy of the cell (e.g., by attaching a Select process and performing a Select All from the previous cell). This will create another target cell to which you can apply a different relationship to the control cell.

## Working with offers

You can perform the following tasks relating to offers:
- "Creating new offers"
- "Duplicating offers" on page 117
- "To edit an offer" on page 118
- "To move an offer or offer list" on page 119
- "Adding offers to offer lists" on page 119
- "Deleting offers" on page 119
- "Retiring offers" on page 120
- "To assign an offer to a cell in a flowchart CSP" on page 140
- "Searching for offers" on page 122
- "To view offer reports from a Summary page" on page 123

**Note:** Working with offers requires the appropriate permissions. For information on permissions, see the *Campaign Administrator's Guide*.

### Creating new offers

You should create offers to represent the marketing messages you want to communicate to your customers or prospects. Whether you create a new offer or simply a version of an offer depends on how offer templates were defined by your administrator.

You must create a new offer in the following situations:
- Whenever non-parameterized offer fields change;

- When you need a new offer code for tracking purposes (for example, for pre-printing response codes on mailers).

In addition to creating a completely new offer, you can add an offer by duplicating an existing offer and modifying it as required.

**Note:** To be able to create offers in a folder, you must have the appropriate permissions in the security policy governing that folder.

### To add a new offer

**Note:** Before you can create a new offer, you must have access permissions for at least one offer template on which to base the offer.

1. Select **Campaign > Offers**.

   You see the Offers page.

2. Click the **Add an Offer** icon.

   If you have more than one offer template in your Campaign system, you see the Select an Offer Template page. If only one offer template exists, you do not select a template; you are taken directly to the New Offer page.

3. Select the template on which to base your new offer. The selected offer template's name, description, suggested usages, offer and treatment code formats, and static and parameterized attributes are displayed.

4. Click **Continue**.

   You see the New Offer page.

5. Enter values for the new offer, including default values for any parameterized attributes.

   For attributes with values supplied in a drop-down list and that allow the addition of list items, you can add list items here as you create the offer. Any additions to the list are saved back to the offer custom attribute and are then available to all users. Once you save changes, you cannot remove list items that you add. Only administrators can remove items from lists, by modifying the custom attribute.

   **Note:** Offer names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

6. When you have finished entering your offer details, click **Save Changes**.

   You see the Offer Summary page for the new offer.

## Relevant products for offers

Relevant products is a required attribute in offer templates, although it does not need to be populated in each offer. When you create an offer, you can specify a query which returns the list of product IDs that you want to associate with this offer. These product IDs can then be used for inferred response tracking to determine whether an event (for example, a purchase) is considered to be a response (for example, a purchase of one of the relevant products associated with an offer is considered a response).

You can also import a list of product IDs during offer creation by copying them from a source file and pasting them into Relevant Products definition when creating a new offer.

## To import a list of relevant products to an offer by pasting

1. In Campaign, when creating a new offer, on the New Offer page, click **Import Product IDs**. The Select Products window opens.

2. Copy product IDs from your source file, using `Copy` from the context menu or `Ctrl+C`.

   **Note:** When copying product IDs, you can use one or more of the following delimiters: tab, comma, or linefeed/newline. Multiple consecutive delimiters are ignored. If product IDs are text strings, spaces are not stripped, and case is preserved.

3. Paste the IDs that you have copied into the Import Product IDs list, using `Paste` from the context menu, or `Ctrl+V`. While working in the Select Products window, you can also manually add, edit, or delete entries from the Import Product IDs list. There is no limit to the number of entries you can paste into the Import Product IDs list.

4. When you have finished adding entries to the Import Product IDs area, click **Import**.

   The IDs from the Import Product IDs area are imported and listed in the Select Products Where section, with "PRODUCTID =" prepended to each product ID. If any errors are detected during import (for example, alphabetic characters when the Product ID field is numeric, or exceeding the maximum string length for a text product ID), you see a pop-up for each error. Note each error and click OK to view the next error.

   **Note:** The Import feature only imports a product ID once; duplicate occurrences of the same value are automatically ignored.

   **Note:** You can continue to paste and import product IDs until you click **Save Changes** on the Select Products window. Once you have exited the Select Products window, you cannot import additional product IDs. Clicking **Import Product IDs** again clears any existing query to allow you to begin anew. If you do not want to clear your existing query, click **Cancel** when prompted for confirmation.

5. When you have finished importing product IDs, click **Save Changes**. The product IDs that were in the Select Products Where list are saved as a query for the offer, and the list of product IDs is displayed under Relevant Product(s).

6. Continue creating the offer.

## To edit the relevant products query for an offer

After importing a list of relevant products for an offer, the list is saved as a query. You can edit this query, including adding additional query conditions, when you edit the offer.

1. In Campaign, open the offer for which you want to edit the list of Relevant Products.

2. Under the list of Relevant Products, click **Edit Query** . The Select Products window opens, displaying the list of IDs currently in the query under Select Product Where.

3. Edit the query, using the **<<** button to remove a selected entry from the list, or the up and down arrow buttons to change the order of entries. Add a query clause using any attribute in the UA_Products table, including Product ID, using the **>>** button to move it to the **Select Products Where** list.

4. When you have finished editing the query, click **Save Changes** to save the query

5. On the offer Edit page, click **Save Changes** to save the offer.

### To clear the relevant products query for an offer

After importing a list of relevant products for an offer, the list is saved as a query. You can clear the entire query, including all existing product IDs in the query when you edit the offer.

1. In Campaign, open the offer for which you want to clear the list of Relevant Products.

2. Under the list of Relevant Products, click **Import Product IDs** . You see a warning indicating that importing Product IDs will reset all existing conditions.

3. Click **OK** . The Select Products window opens, with no IDs displayed. You can now import new Product IDs, or import no IDs to leave the query empty.

4. Click **Save Changes** to save the query

5. On the offer Edit page, click **Save Changes** to save the offer.

### To remove selected products from the relevant products query

You can remove selected products from the query rather than clearing the entire query.

1. In Campaign, open the offer for which you want to remove selected product IDs from Relevant Products.

2. In the list of Relevant Products, select the items you want to remove by holding the Ctrl key and selecting with your mouse.

3. When you have finished selecting the items you want to remove, click **Remove** . The selected items are removed from Relevant Products.

4. Click **Save Changes** to save the offer.

## Duplicating offers

Duplicating existing offers to create new ones can save data entry time. Retired offers as well as active offers can be duplicated. Offers that are created by duplication are automatically assigned unique offer codes; they are named "Copy of <original offer name>" and have the same description, security policy, and offer attribute values as the original offer.

**Note:** Duplicated offers are created in the same folder as their originals, but can be moved to a different location later. You must have the appropriate permissions to be able to duplicate and move offers.

### To duplicate an offer from the Offers page

1. Select **Campaign > Offers**. The Offers page appears.

2. Navigate to the folder containing the offer(s) you want to duplicate.

3. Select the checkbox(es) next to the offer(s) you want to duplicate.

4. Click the **Duplicate Selected Offers** icon. A confirmation window appears.

5. Click **OK** to continue. The selected offer(s) are duplicated and are displayed in the list of offers.

### To duplicate an offer from the offer's Summary page

1. On the Offer Summary page of the offer you want to copy, click the **Create Duplicate Offer** icon. A confirmation window appears.

2. Click **OK** to continue. You see the New Offer page in Edit mode, with fields pre-populated with values from the original offer but with a new offer code.

3. Edit the values that you want to change, including the offer name and description.

   **Note:** Offer names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215

4. Click **Save Changes** to create the new offer. The offer is saved; you are taken to the Offer Summary page of the new offer.

# Grouping offers

You might want to group offers for reporting or analysis purposes. For example, you might want to see the response rates to a "Free Shipping" offer that was sent through various channels and offered at different times of year.

**Note:** For any report to use an offer attribute for grouping or roll-up purposes, the report must be customized by your report administrator.

You can group offers in two ways.
- Using attributes
- In folders

## Using attributes

You can create any number of custom attributes in your offers to use as "offer grouping fields." For example, if you have various college-affiliation credit card promotions, you could create a custom attribute called "region" that you can then use in reports. This would allow you to group together offers targeted to alumni of colleges in New England colleges versus those on the West coast.

When you create offers that use custom attributes, you must enter the values manually. You can also duplicate a similar offer to reduce data entry effort, as the values of parameterized attributes will also be copied.

Offer attributes can also be used within smart offer lists to identify and group offers.

## Grouping offers in folders

It can be useful to group offers in folders for reporting purposes. If you maintain all related offers in the same folder, and specify the folder as the target when prompted for offers to report on, all the offers in that folder (and in any of its subfolders) are automatically selected for reporting.

**Note:** Including folder and subfolder contents for reporting in this way does not achieve "roll up" reporting for the offers. They are simply selected based on inclusion in a folder structure.

# To edit an offer

You can edit an existing offer at any time, whether or not it has been used in a contact process, depending on your roles and permissions.

**Note:** Once an offer has been used in production (once it has been assigned to a cell in a flowchart that has been run in production and logged to contact history), you can edit only the offer name, description, and default values for parameterized

offer attributes. This restriction ensures that Campaign can track the exact offer details for offers that have already been given out to individuals.

1. Select **Campaign > Offers**. The Offers page appears.
2. Navigate to the offer you want to edit and click the hyperlinked offer name. The offer's Summary page appears in Read-Only mode.
3. Click the **Edit** icon to enter **Edit** mode.
4. Make your changes.

   **Note:** Offer names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215
5. When you have finished making your changes, click **Save Changes**. Your changes are saved and you are returned to the offer page in Read-Only mode.

## To move an offer or offer list

You can move one or more offers among folders. The procedure for moving offers is the same as that for moving offer lists, and you can move offers and offer lists in the same operation.

**Note:** When you move any objects in Campaign you must be aware that access to different locations can be governed by different security policies. You can only move offers into a folder with a security policy in which you have permissions to do so.

1. From the Offers page, select the offer(s) or offer list(s) you want to move, and click the **Move Selected Items** icon.

   An alternative way to move an offer is to view its Offer Summary page and click the **Move to Another Folder** icon. Be aware, however, that this alternative method is available only for moving offers, not offer lists.

   The Move Items To window appears.
2. Navigate to the folder to which you want to move the selected items.
3. Click **Accept this Location**.

The selected offer(s) or offer list(s) are placed in the folder you chose.

## Adding offers to offer lists

You can add offers to static offer lists either when you create the offer list, or by editing the list.

**Note:** Newly created offers can become part of smart offer lists with no action on your part if they meet the smart offer list query criteria.

## Deleting offers

You must have the appropriate permissions before you can delete an offer or offer list. In addition, to preserve system integrity, Campaign will not allow you to delete offers or offer lists that have been referenced in system tables. This includes offers or offer lists that:

- are associated with a campaign;
- have been assigned to a cell in a contact process in a flowchart for which contact history has been populated; or
- have been assigned to a cell in an Optimize process in a flowchart.

**Important:** If you attempt to delete an offer or offer list in these situations, a confirmation message appears indicating that the offer or offer list will be retired instead of deleted. To prevent further use of offers or lists that have been referenced in system tables, you should retire rather than delete them.

If the offers you want to delete belong to any static offer lists, you will be asked to confirm the deletion. If you choose to continue, the deleted offer(s) are automatically removed from any static offer lists.

Contact processes containing cells that were assigned offers that have subsequently been deleted will remain configured, but the offer will be indicated as "Unknown Offer" in the process configuration dialog, and a warning will be produced when the flowchart is run.

The procedure for deleting offers is the same as that for deleting offer lists, and you can delete offers and offer lists in the same operation.

### To delete an offer or offer list

1. From the Offers page, select the offer(s) or offer list(s) that you want to delete, and click the **Delete Selected Items** icon.

   OR

   From the Offer Summary page of the offer you want to delete, click the **Delete This Offer** icon. A confirmation window appears.

2. Click **OK**. You are returned to the Offers page. The deleted offer(s) is (are) no longer displayed.

## Retiring offers

If you have the appropriate permissions, you can retire offers and offer lists to prevent their further use. Retiring an offer does not affect campaigns or flowcharts in which the offer has already been used, and maintains the data integrity with any system table data that has been generated based on the offer, such as contact and response history.

Retired offers remain visible in the offer hierarchy, but are grayed out. They can be found using the search feature, can be duplicated to create new offers, and are available for reporting. However, they can no longer be assigned, and cannot be given out as part of an offer list.

You can clean up static offer lists by deleting retired offers from them. Smart offer lists do not require cleanup as they will resolve only to non-retired offers matching their query criteria.

**Note:** Once you retire an offer, you cannot re-enable it. Instead, if you need an offer with the same details, you can create a new one by duplicating the retired offer.

The procedure for retiring offers is the same as that for retiring offer lists, and you can retire offers and offer lists in the same operation.

### To retire an offer or offer list

1. From the Offers page, select the offer(s) or offer list(s) you want to retire, and click the **Retire Selected Lists** icon.

An alternative way to retire an offer is to view its Offer Summary page and click the **Retire This Offer** icon. Be aware, however, that this alternative method is available only for offers, not offer lists. A confirmation window appears.

2. Click **OK**. You are returned to the Offers page.

The retired offer(s) and offer list(s) are retired and displayed in gray.

## To assign offers to cells from the process configuration dialog

**Note:** If your Campaign environment is integrated with Marketing Operations, you must use Marketing Operations to assign offers or offer lists to output cells in the target cell spreadsheet form of a campaign project. If your Campaign environment is configured to access legacy campaigns, use the instructions in this guide to assign offers or offer lists to output cells in legacy campaigns. For legacy campaigns, there are two ways to assign offers to cells: from the campaign's target cell spreadsheet, or within a process configuration dialog. For more information, see "About integration with IBM Unica Marketing Operations" on page 4.

You can assign offers or offer lists to an output cell from the configuration window of a contact process.

Before you configure the contact process, ensure that the offer or offer list that you want to use exists.

1. In a flowchart in **Edit** mode, double-click the contact process containing the cell(s) to which you want to assign your offer(s). You see the process configuration dialog.
2. Click the **Treatment** tab.

   You see the **Assign offers to cells** interface, displaying one row for each target cell defined in the process.
3. For each target cell displayed in the table, click the **Offer** column to select from a drop-down list of available offers, or click **Assign Offers**.

   **Note:** If your input cell(s) are linked to a top-down cell defined in the Target Cell Spreadsheet (TCS) and offers or offer lists have already been assigned to the cell(s) in the TCS, those will be displayed here. You can override these assignments if desired. Any changes you make in the contact process will be reflected in the TCS after you save the flowchart.
4. To use holdout control groups, select the **Use Holdout Control Groups** checkbox.

   The offer assignment table dynamically updates to display additional columns for indicating whether a target cell is a control, and what cell is a control for the current cell.

   a. For each cell, indicate whether it is a control cell by clicking in the **Control?** column and selecting **Y** or **N**. By default, the setting is N. Cells that are designated as control cells cannot be assigned offers. Once designated as control cells, these cells appear in the **Control Cell** drop-down list, so that you can select them as controls against target cells.

   b. For each cell that is not a control cell, optionally specify a control cell from the **Control Cell** drop-down list. This list is populated with the names of cells for which you have indicated **Control? = Y**.
5. Click the **Parameters** tab to specify offer parameters for each cell. If the offers you are assigning contain parameterized attributes, you can view the default

values and override those values if you want to. You see one row per parameter per offer. For example, if one offer contains four parameterized attributes, you will see four rows for that offer.

6. Use the **For Cell(s)** drop-down menu to indicate which cell(s) will have the parameter values you specify applied to them.

   If you have multiple cells and select **[All Cells]**, you see one row per offer per parameter. Values that you enter in the **Assigned Value** field are applied to every cell that received that offer.

   If the same offer is assigned to multiple cells but with different parameter values for different cells, the **[All Cells]** view displays **[Multiple Values]** for those parameters.

   If you select an individual cell, the table displays only the offers assigned to the cell you selected. Values that you enter in the **Assigned Value** field are applied only to that cell.

   **Note:** If you have many parameter values to enter, you can save data entry effort by using the **[All Cells]** option to apply values that will be applicable to most of the cells, then select individual cells to override their parameter values.

7. Edit the value(s) in the **Assigned Value** field(s) as required.

   **Note:** You can use constants, derived fields, or table fields as the parameter values.

8. When you have finished assigning offers and specifying offer parameter values, you need to complete the remainder of the process configuration.

## Searching for offers

Campaign supports searches for offers but not for offer lists. You can perform a basic search for offers using any of the following criteria:

- Name or partial name
- Description or partial description
- Offer code or partial offer code
- Owner name

In addition, you can use the Advanced Search feature to find offers or offer lists using queries based on offer attributes and specified values.

### To use Advanced Search to search for offers

1. From an Offers folder, click the **Advanced Search** icon.

   The **Advanced Search Options** window appears.

2. In the **Create a Condition** section, select an offer attribute to use in the **On This Attribute** field.

3. Based on the type of attribute you selected, you can enter further conditions for searching. For example:

   - On the attribute "Cost Per Offer", search for values less than or equal to $10.00
   - On the attribute "Expiration Date", search for specified date of 11/30/2007
   - On the attribute "Description", search for specified values that do not contain the string "2005"

4. Click **AND>>** or **OR>>** to move your set(s) of criteria to the **Find Offers Where** section, and to build your query. To remove a condition from the **Find Offers Where** section, click **<<** .

**Note:** Depending on the operator(s) that you use in your query (for example, =, >, contains, begins with, and so on), you might be able to select multiple values or only a single value. Be aware that in some cases when you choose multiple values with an operator, you create "OR" conditions. For example, if you create a query where "Color =" and select blue, red, and white as the colors, the query you create is "Color = blue OR color = red OR color = white."

5. When you have finished building your query, click **Search**.

The Search Results page displays any offers that match your search criteria.

## All Offers page icons

The All Offers page uses the following icons



The icons, left to right, are described in the following table.

*Table 15. The All Offers page icons*

| Icon Name | Description |
|---|---|
| Add an Offer | Click to add a new offer. |
| Add a List | Click to add a new offer list. |
| Add a Subfolder | Click to add a new offer subfolder. |
| Advanced Search | Click to open the Advanced Search Options dialog, where you can specify attributes and values to search for offers. |
| Print this Item | Select one or more offers by clicking the checkbox next to each offer, then click this icon to print the selected offer(s). |
| Move Selected Items | Select one or more offers by clicking the checkbox next to each offer, then click this icon to move the selected offer(s). |
| Delete Selected Items | Select one or more offers or offer lists by clicking the checkbox next to each item, then click this icon to delete the selected item(s). |
| Retire Selected Lists | Select one or more offers or offer lists by clicking the checkbox next to each item, then click this icon to retire the selected item(s). |
| Duplicate Selected Offers | Select one or more offers by clicking the checkbox next to each offer, then click this icon to duplicate the selected offer(s). |
| Reload Offers | Click this icon to refresh the list of offers and offer lists on the page. |

## To view offer reports from a Summary page

You can access reports on offers from their Summary pages. These are the same as the reports available in the **Campaign Analytics** area of the application, except that they provide data only for the current offer.

1. Click **Campaign > Offers**.

The Offers page appears.

2. Navigate through the folder structure to find the offer for which you want to view a report.
3. Click the offer name.

   The Offer Summary page appears.
4. Click the **Analysis** tab.
5. Select a report from the **Report Type** drop-down list.

Campaign displays the selected report.

## Working with offer lists

You can perform the following tasks with offer lists:
- "To add a static offer list"
- "To add a smart offer list"
- "To edit an offer list" on page 125
- "Moving offer lists" on page 125
- "Deleting offer lists" on page 125
- "Retiring offer lists" on page 125
- "Assigning offer lists to cells" on page 126

**Note:** Working with offer lists requires the appropriate permissions. Form information on permissions, see the *Campaign Administrator's Guide*.

### To add a static offer list

1. Select **Campaign > Offers**.

   The Offers page appears.
2. Click the **Add a List** icon.

   The New Offer List page appears.
3. Enter a name, security policy, and optionally a description for the offer list.

   **Note:** Offer list names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
4. Leave the **This is a smart offer list** checkbox unchecked.
5. In the **Included Offers** section, use the Tree or List View to select offers to add to your list. Move the selected offers to the **Included Offers** box using the **>>** button.
6. When you have finished selecting your offers, click **Save Changes**. You are returned to the Offer List Summary page for your new list.

### To add a smart offer list

1. Select **Campaign > Offers**.

   The Offers page appears.
2. Click the **Add a List** icon.

   The New Offer List page appears.
3. Enter a name, security policy, and optionally a description for the offer list.
4. Select the **This is a smart offer list** checkbox.
5. In the **Included Offers** section, use existing offer attributes, their values, and the AND and OR operators to create conditions for including offers in this offer list.

6. If desired, use the folder view under Restrict search access (for all users) to limit the search to selected folders. To include subfolders in search results, select the Include Subfolders checkbox.

    **Note:** Any offers chosen as a result of this search will be available to any user with access permissions to this offer list, even if they do not normally have permissions to see or access the offers.

7. If desired, use the drop-down lists under **Order Matching Offers by** to select the offer attribute by which you want matching orders to be sorted, and whether the sort is in Ascending or Descending order.

8. If desired, indicate whether you want to limit the search results to the first "X" offers matching. By default, there is no limit.

9. When you have finished defining the criteria for your smart offer list, click **Save Changes**. You are returned to the Offer List Summary page for your new list.

## To edit an offer list

After you save your offer list changes, any campaigns using offer lists will automatically use the latest offer list definitions when they are next executed.

1. Select **Campaign > Offers**.

    The Offers page appears.

2. Click the hyperlinked name of the offer list that you want to edit.

    The **Summary** tab for the offer list appears.

3. Click the **Edit** icon.

    The offer list details appear in **Edit** mode.

4. Make the desired changes.

    Offer list names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

5. When you have finished making your changes, click **Save Changes**. You are returned to the Offer List Summary page for your list.

## Moving offer lists

You can move one or more offer lists among folders by performing the same steps as you do to move offers, and you can move offers and offer lists in the same operation.

## Deleting offer lists

You can delete one or more offer lists by performing the same steps as you do to delete offers, and you can delete offers and offer lists in the same operation.

## Retiring offer lists

You can retire an offer list at any time to prevent its further use. Retiring an offer list does not affect the offers contained in that list.

Retired offer lists remain visible in the offer hierarchy, but are grayed out. They are available for reporting; however, they can no longer be assigned.

**Note:** Once you retire an offer list, you cannot re-enable it. If you need an offer list with the same details as a retired one, you must manually recreate it.

You retire offer lists by performing the same steps as you do to retire offers, and you can retire offers and offer lists in the same operation.

## Assigning offer lists to cells

**Note:** If your Campaign environment is integrated with Marketing Operations, you must use Marketing Operations to assign offers or offer lists to output cells in the target cell spreadsheet form of a campaign project. If your Campaign environment is configured to access legacy campaigns, use the instructions in this guide to assign offers or offer lists to output cells in legacy campaigns. For legacy campaigns, there are two ways to assign offers to cells: from the campaign's target cell spreadsheet, or within a process configuration dialog. For more information, see "About integration with IBM Unica Marketing Operations" on page 4.

You can assign offer lists to cells in contact processes in the same way as you assign individual offers. You can assign any combination of offers and offer lists to the same cell.

However, any parameterized attributes in the offers contained in the offer list will use their default values. You will not be able to assign parameter values for offers contained in the offer list. If you need to change parameterized values, you can do one of the following:

- change the default value(s) associated with the existing offer, create a copy of the offer with the desired defaults, and ensure that it is used in the offer list;
- assign the offer individually, outside of an offer list.

# Chapter 8. Cells

A cell is a list of identifiers (such as customer or prospect IDs from your database) to which you will assign one or more offers in Campaign.

You create cells by configuring and running data manipulation processes in flowcharts. These output cells can also be used as input for other processes in the same flowchart (downstream from the process which created them).

Each cell generated in a flowchart has:

- a system-generated **cell code**. The cell code has a standard format determined by your system administrators, and is unique when generated. Cell codes are not checked for uniqueness unless the flowchart configuration parameter `AllowDuplicateCellCodes` is set to "No," in which case cell codes are enforced to be unique only within the current flowchart. For more details about cell codes and cell code generators, see the *Campaign Administrator's Guide*. For more details about configuration parameters in the central configuration parameter provided by IBM Unica Marketing, see the *IBM Unica Marketing Administrator's Guide*.
- a system-generated **cell name**, unique within the current flowchart.

In addition to creating cells in flowcharts, you can also create placeholder cell codes in the target cell spreadsheet, to which you can later link cells created in flowcharts.

## Cell names and codes

Cell names and codes are important because they establish the links between processes that output cells or use cells as input.

### Cell codes

Cell codes have a standard format determined by your system administrators, and are unique when generated. Because cell codes can be edited, they are not checked for uniqueness unless the flowchart configuration parameter AllowDuplicateCellCodes is set to "No," in which case cell codes are enforced to be unique only within the current flowchart. There is no checking for uniqueness in the target cell spreadsheet (TCS). For details about cell codes and cell code generators, see the *Campaign Administrator's Guide*. For details about configuration parameters in the central configuration parameter provided by IBM Unica Marketing, see the *IBM Unica Marketing Administrator's Guide*.

### Cell names

**Note:** Cell names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

By default, cell names are based on the process from which they are generated (for example, if a cell is generated by a process named "Select1", then the default cell name is "Select1") but they can be overridden. If you change a process name, the names of cells generated by that process are automatically changed as well, both in that process and in any connected downstream processes within the same

flowchart. If you change a cell name, you might also affect the links between that cell and any downstream processes using that cell as input.

For example, if you have a Segment process that generates two output cells named Segment1 and Segment2, and these cells are used as input into two Mail List processes (Mail List 1 and Mail List 2), if you change the names of the Segment cells after you have already connected the Mail List processes, you need to understand how Campaign handles the new cell names.

The following diagram illustrates a basic example of a Segment process that outputs two cells, each cell then becoming the input for downstream Mail List processes.



## Examples: cell renaming scenarios

### Scenario 1: All new cell names are different from any of the original names

If no new cell names overlap with the original default names (that is, in the example, if you do not use "Segment1" or "Segment2" as the name for either of the Segment output cells), then Campaign can maintain the original linkages based on the original "order" of the cells. In this situation, because there is no overlap or re-use of either of the original cell names, the linkage between the output cells from the Segment process and the two respective Mail List processes remains unchanged, as shown in the following diagram.

Scenario 1:
All new cell names are different
from any of the original cell names

Segment
process

Output cell
"Segment1"
renamed
"NewName1"

Output cell
"Segment2"
renamed
"NewName2"

Input cell
"Segment1"

Linkages do
not change
because new
cell names do
not overlap
with or reuse
the original set
of names

Input cell
"Segment2"

Mail List 1
process

Mail List 2
process

## Scenario 2: The set of new cell names is identical to the original set of cell names, but re-ordered

If the new names you choose for your cells are exactly the same as the names in the original set and simply re-ordered, the downstream processes will look for available output cells by name (that is, the new cell names), and the linkages will be switched as necessary. In the example, the newly renamed Segment2 output cell is now the input cell to Mail List 2, and the newly named Segment1 cell is now the input cell to Mail List 1, as shown in the following diagram.

Scenario 2:
New cell names are identical to original
set of cell names, but re-ordered

Segment
process

Output cell
"Segment1"
renamed
"Segment2"

Output cell
"Segment2"
renamed
"Segment1"

Input cell
"Segment1"

Input cell
"Segment2"

Mail List 1
process

Linkages
change based
on new cell
names

Mail List 2
process

The following diagram illustrates the same situation with three output and input cells.

Segment
process

Output cell
"Segment1"
renamed
"Segment2"

Output cell
"Segment2"
renamed
"Segment3"

Output cell
"Segment3"
renamed
"Segment1"

Input cell
"Segment1"

Input cell
"Segment2"

Input cell
"Segment3"

Mail List 1
process

Mail List 2
process

Mail List 3
process

Linkages change based on cell names. The
downstream processes are relinked based on the
original output cell names that they were linked to.

## Scenario 3: The set of new cell names overlaps with some of the original cell names, and new cell names are introduced

If the new names overlap with some of the original names, and new cell names are added, any links using names in the original set of cell names can be recognized, otherwise they are broken. For example, if you rename cell "Segment1" to "Segment2" and rename cell "Segment2" to "NewSegment", the new "Segment2" will be hooked up to Mail List2 and Mail List1 will become unconfigured, because it cannot find an input cell name with the name "Segment1."

Scenario 3:
New cell names are introduced
to original set of cell names

Segment
process

Output cell
"Segment1"
renamed
"Segment2"

Output cell
"Segment2"
renamed
"NewSegment"

Input cell
"Segment1"
cannot be found

Input cell
"Segment2"

Mail List 1
process becomes
unconfigured

Mail List 2
process

## Working with cells

You can perform the following tasks with cells:

## To create a cell in a flowchart process

You create cells as the output of any data manipulation process (such as Audience, Extract, Merge, or Select) in a flowchart.

1. In a flowchart in **Edit** mode, configure a data manipulation process.
2. When you run the process, one or more cells (depending on the type of process and the configuration details) are created as the output of the process.

   **Note:** In addition to creating cells in flowcharts, you can also create placeholder cells in the target cell spreadsheet, then later link them to cells in flowcharts.

## Limiting the size of output cells

To limit the number of IDs generated by data manipulation processes such as Audience, Extract, Merge, or Select, click the **Cell Size Limit** tab of the process configuration dialog.

The options that you have for limiting output cell size depend on whether the process accepts input from a cell or a table. In processes that can accept either type of input, the Cell Size Limit window changes dynamically to present options appropriate to the input type.

- Processes taking input from an output cell
- Processes taking input from a table

For either type of input, you can also change the random seed for use in selecting IDs randomly.

### Processes taking input from an output cell

If the process takes input from an output cell, the Cell Size Limit window that appears is shown:

On this window, you specify the limits that you want to place on the output cell
size.

- **Unlimited cell size** — returns all IDs satisfying the query or selection criteria on
  the tab of this process. This is the default option.
- **Limit output cell size to** — returns an exact specified number of unique IDs,
  selected randomly from all IDs that meet your query criteria. In the text box,
  enter the number of IDs that you want returned. With this method, for processes
  taking input from cells, Campaign matches the deduplicated records returned
  from the database to those of the input cell(s), then performs a random selection
  to arrive at the final cell size. Note that the ID list in cells passed from process to
  process is always unique.

**Note:** Selecting records with the random option uses a large amount of temporary
space and takes the most time, because all IDs must be retrieved to the Campaign
server. Use this option only when it is important for exactly *N* records to be
returned.

### Limiting the output cell size based on the input cell size

In processes that take input from cells, you can use the sizes of cells from
connected incoming processes as attributes for limiting the output cell size, even if
you are not using the actual cell data or IDs.

For example, if you connect 3 processes that each have one output cell, to a Select
process, you might use only one of the three incoming cells as the actual data
input for the Select process, but you can use the *attributes* of the other incoming
cells to specify the output cell size for the Select process. A solid line connects the
process whose output cell is actually used by the Select process; dotted lines
connect the processes whose output cells are not used as data input but only have
a temporal relationship with the Select process.

Use the **Limit output cell size based on sizes of input cells** checkbox to specify the input cells whose size attributes you want to use for limiting your current process's output cell size. Some of these options act in conjunction with the **Limit output size to** value that you specify.

**To limit output cell size based on size of input cells:**

1. Click the **Cell Size Limit** tab in the process.

   You see the Cell Size Limit window.

2. Choose the method by which the limits will be calculated by selecting an option from the pull-down list:

   - **Largest Checked Cell** — specifies that the output cell size should not exceed the size of the largest selected input cell. For example, if cells A, B, and C are checked, with sizes of 250, 500, and 100 respectively, the size of the output cell for this process would be limited to 500, the largest of the input cell sizes.

   - **Maximum Size (Above) Minus Sum of All Checked Cells** — use this option in conjunction with the **Limit output cell size to** value specified above. This option specifies that the output cell size should not exceed , where is the difference between the number specified in the **Limit output cell size to** field above, and the sum of all selected input cells. For example, if you entered 1000 as the **Limit output cell size to** value, and checked input cells A and B with sizes 100 and 200 respectively, the size of the output cell for this process would be limited to 1000 – (100+200) = 700.

   - **Size of Any Checked Cells** — specifies that the output cell size should not exceed the size of any of the selected input cells. For example, if cells A, B, and C are checked, with sizes of 250, 500, and 100 respectively, the size of the output cell for this process would be limited to 100, the smallest of the input cell sizes.

   - **Sum of All Checked Cells** — specifies that the output cell size should not exceed the total size (sum) of all the selected input cells. For example, if cells A, B, and C are checked, with sizes of 250, 500, and 100 respectively, the size of the output cell for this process would be limited to 850, the sum of all three of the input cell sizes.

3. In the list of input cells, select the checkboxes for the input cells on whose size(s) you want the output cell size criteria to be based.

## Processes taking input from a table

If the process takes input from a table (or a strategic segment, in processes that allow this option), the Cell Size Limit window appears.

Use this window to specify limits on the output cell size. The key differences
between the **Limit** options is in their impact on resources and the final number of
resulting records when your data source is non-normalized.

- **Unlimited cell size**: Returns all IDs that meet the query or selection criteria on
  the tab of this process. This is the default option.
- **Limit output cell size to**: Returns an exact specified number of unique IDs,
  selected randomly from all IDs that meet your query criteria. Enter the number
  of IDs that you want returned. Campaign deduplicates the complete set of IDs
  prior to random selection, then retains only the specified number of records, so
  that a list of unique IDs is returned even when duplicates exist on the ID fields.

  **Note:** Selecting records with this option uses a large amount of temporary space
  and takes the most time, because all IDs must be retrieved to the Campaign
  server. Use this option only when the data is not normalized on the ID field, and
  if it is important that exactly N records are returned.
- **Limit selection based on**: Use these options to limit Campaign records that meet
  your query criteria. These options reduce the time and memory resources used
  in selecting the final set of records, but can result in fewer than your specified
  number of unique IDs.
  - **First N (fastest)**: Campaign retrieves only the first records that meet your
    query criteria from the database. Campaign stops accepting records once the
    number of records has been received. Campaign then deduplicates these IDs;
    if the data has not been normalized, then your final result contains fewer than
    unique records. This is the fastest method because it takes less time to retrieve
    data and uses less temporary space.
  - **Random**: Campaign receives from the database all records that meet your
    query criteria, then selects number of records randomly from those records.
    Campaign then deduplicates these retained IDs; if the data has not been

normalized, your final result contains fewer than unique records. This option uses less temporary space because only the randomly selected records are retrieved and stored by Campaign.

### Applying test run output cell size limitations

In some processes, including Audience and Select, you can also limit cell size specifically for test runs. Use the options in this section to control the amount of data returned and subsequently processed during a test run.

- **Unlimited cell size** — this is the default option. The number of IDs returned from the query or selection criteria on the **Source** tab of this process is not changed. With this option, the test run operates on all the data that it would during a production run, but offer and contact histories are not populated.
- **Limit output cell size to** — returns an exact specified number of IDs, selected randomly from all IDs that meet your query criteria. In the text box, enter the number of IDs that you want returned. With this method, Campaign deduplicates the complete set of IDs prior to random selection, then retains only the specified number of records, so that a list of unique IDs is returned even when duplicates exist on the ID fields.

**Note:** Selecting records with this option uses a large amount of temporary space and takes the most time, because all IDs must be retrieved to the Campaign server. Use this option only when the data is not normalized on the ID field, and if it is important for exactly *N* records to be returned.

# Changing the cell name

By default, the name of a cell created in a process matches the process name. For processes that create more than one cell, the output cell names are a concatenation of the process name and the segment name. For example, a Segment process named "Segment1" creating 3 segments will have output cells whose default names are "Segment1.Segment1", "Segment1.Segment2", and "Segment1.Segment3."

Cell names are designed to be linked to the name of the process from which they were created. If you edit a process name, the cell names will automatically change as well.

However, if you edit the cell names, you remove their link to the process name. This means that if you subsequently change the process name, the cell name(s) will no longer automatically change.

### To change the name of a cell in a flowchart process

**Note:** When you save changes to the output cell name, if **Auto Generate** is selected for the cell code, the cell code is regenerated. If you do not want the cell code to change, uncheck **Auto Generate** prior to editing the cell name.

1. In a flowchart in **Edit** mode, double-click the process whose output cell name you want to change. You see the process configuration dialog for the process.
2. Click the **General** tab. You see the general information for the process, including the process name and the output cell name.
3. Place your cursor in the **Output Cell Name** field so that the text is selected, and edit the cell name.
4. Click **OK**. Your changes are saved. If you have edited the cell name so that it no longer matches the process name, these names are no longer linked.

**Note:** Saving a flowchart does not trigger any type of validation. To check that your flowchart has configured correctly with no errors, you can manually perform a flowchart validation.

## Resetting the cell name

By default, the name of a cell created in a process matches the process name. For processes that create more than one cell, the output cell names are a concatenation of the process name and the segment name. For example, a Segment process named "Segment1" creating 3 segments will have output cells whose default names are "Segment1.Segment1", "Segment1.Segment2", and "Segment1.Segment3."

If you rename the process, the cell name(s) will automatically change as well, so that the cell name and process name remain linked.

However, if you have change the cell name manually so that it is different from the process name, the cell and process names are no longer linked. You can restore the link by renaming the cell name to the same as the process name.

### To reset the cell name

1. In a flowchart in **Edit** mode, double-click the process whose output cell name you want to reset. You see the process configuration dialog for the process.
2. Click the **General** tab. You see the general information for the process.
3. The next step varies depending on whether you are editing a process that outputs a single cell or multiple cells:
   - In processes that output a single cell, edit the text in the **Output Cell Name** field so that it is identical to the process name displayed in the Process Name field.
   - In processes that output multiple cells, click **Reset Cell Names**. The cell names revert to the default format, which is a concatenation of the current process name and the segment name.

   The process and cell names are now relinked. If you now change the process name, the output cell name will automatically change as well.
4. Click **OK**. Your changes are saved and the process configuration dialog closes.

## About copying and pasting cell names and codes

In processes that output more than one cell, you can use the copy and paste feature to edit multiple output cell names and codes in the Output Cells grid.

### To copy and paste all cells in the grid

In processes that output more than one cell, you can use the copy and paste feature to edit multiple output cell names and codes in the **Output Cells** grid.

1. In a flowchart in **Edit** mode, double-click the process for which you want to copy and paste cell names and codes. You see the process configuration dialog for the process.
2. Click the **General** tab. You see the general information for the process, including the **Output Cells** grid.
3. In the **Output Cells** grid, click anywhere to select all cells. All cells are always selected for pasting regardless of the cursor position.

   **Note:** The **Cell Code** column is not selectable or editable unless you clear the **Auto Generate Cell Codes** checkbox.
4. Click **Copy**. All cells are copied to the clipboard.

5. Click inside the cell that will be at the top left position of where you want to paste the cells.

6. Click **Paste**. The contents of your copied cells replaces the original content of a block of cells the same size as that which was copied.

### To paste cell names and codes from an external spreadsheet

1. Select and copy cells or text from an external spreadsheet or other application using that application's copy feature.

2. In Campaign, in a flowchart in **Edit** mode, double-click the process for which you want to copy and paste cell names and codes. You see the process configuration dialog for the process.

3. Click the **General** tab. You see the general information for the process, including the **Output Cells** grid.

   **Note:** The **Cell Code** column is not selectable or editable unless you clear the **Auto Generate Cell Codes** checkbox. If you want to paste content into the **Cell Code** column, make sure you clear this checkbox.

4. Click inside the cell where you want to paste what you have copied. If you are copying and pasting a rectangular group of cells, click inside the cell that will be the top left cell of the rectangle.

5. Click **Paste**. The contents of your copied cell(s) replaces the original contents of a block of cells the same size.

## Changing the cell code

By default, a cell's code is automatically generated by the system, based on the format defined for all cell codes by your system administrators. Cell code uniqueness is enforced across flowcharts and campaigns, but cell codes can be duplicated within flowcharts if you have the flowchart configuration parameter AllowDuplicateCellCodes set to "Yes."

For more details about configuration parameters in the central configuration parameter provided by IBM Unica Marketing, see the *Marketing Platform Administrator's Guide*.

**Note:** Although you can override the default system-generated cell code, any cell code you enter manually must still conform to the cell code format. This format is displayed below the **Cell Code** field in the process configuration dialog. Code formats are represented by constants and variables as follows: uppercase letters represent alphabetical constants, a lowercase "n" represents a numeric character. For example, a cell code format of "Annn" indicates that the cell code must be 4 characters long, with the first character being uppercase "A", followed by 3 numbers. A sample cell code of this format would be "A454."

### To change the code for a cell in a flowchart process

1. In a flowchart in **Edit** mode, double-click the process whose output cell name you want to change. You see the process configuration dialog for the process.

2. Click the **General** tab. You see the general information for the process.

3. Clear the **Auto Generate** checkbox if it is selected. The **Cell Code** field becomes editable.

4. In the **Cell Code** field, edit the cell code. Remember that the modified code must conform to the cell code format displayed below the **Cell Code** field.

5. When you have finished editing the cell code, click **OK**. The process configuration dialog closes and your changes are saved.

## To match and link flowchart cells using the Match and Link Target Cells dialog

In addition to linking cells from each process's configuration dialog, you can link and manage target cells for the entire flowchart from the **Match & Link Target Cells** dialog. Before you do this, make sure placeholder cell codes and names exist in the target cell spreadsheet for the campaign. If you want to perform Automatching, make sure the cells defined in the target cell spreadsheet have the same name, or names starting with at least the same three characters as the output cell names.

1. In a flowchart in **Edit** mode, select the **Options** > **Match & Link Target Cells** option.

   You see the Match and Link Target Cells dialog, displaying Available Target Cells in the left pane, and flowchart output cells in the right pane.

2. To automatically match target cells and flowchart output cells based on name, click **Automatch**.

   Successfully automatched cells have a status of **Exact** or **Best Match** displayed in the right pane. Target cells that have been matched display in red.

3. To complete the linking of these matched pairs of cells, click **OK** to save and close the dialog.

   You see a warning indicating that the flowchart run results will be lost. Click **OK** to continue.

   The next time you view the **Match & Link Target Cells** dialog for this flowchart, you see that the status of the cells you matched and linked is displayed as **Linked**.

   **Note:** Target cell linkages are not saved in the database until you save the flowchart. If you cancel changes in the flowchart, cell linkages are not saved to the database.

## To unmatch or unlink flowchart cells using the Match and Link Target Cells dialog

**Note:** Unlinking cells that have associated contact history causes these cells to be "retired". Because retired cells are not displayed in the target cell spreadsheet, they will no longer be visible there. To retain cells in the target cell spreadsheet, delete contact history for the cell before unlinking it.

1. In a flowchart in **Edit** mode, select the **Options** > **Match & Link Target Cells** option.

   Any matched or linked cells are displayed in the right pane, with their status indicated in the **Status** column.

2. To unmatch all matched cell pairs, click **Unmatch All**.

   The unmatched target cells are refreshed in the **Available Target Cells** pane, and the output cell **Status** and **Target Cell Name** columns are cleared. Linked pairs of cells are not changed.

3. To unlink all linked cell pairs, click **Unlink All**.

   Previously linked pairs are unlinked, but they remain matched. The target cells now appear in the **Available Target Cells** list in red, as matched target cells.

**Note:** Target cell linkages are not saved in the database until you save the flowchart. If you cancel changes in the flowchart, cell linkages are not saved to the database.

## To manually match and link flowchart cells using the Match and Link Target Cells dialog

1. In a flowchart in **Edit** mode, select the **Options** > **Match & Link Target Cells** option.

   You see the Match and Link Target Cells dialog, displaying Available Target Cells in the left pane, and flowchart output cells in the right pane.

2. Select one or more pairs of target cells and flowchart output cells to match, and click **Match > >**.

   The selected target cells are matched, in order, with the selected flowchart output cells. Successfully matched output cells have a status of **Manual** displayed, and target cells that have been matched display in red.

3. To complete the linking of these matched pairs of cells, click **OK** to save and close the dialog.

   You see a warning indicating that the flowchart run results will be lost. Click **OK** to continue.

   The next time you view the **Match & Link Target Cells** dialog for this flowchart, you see that the status of the cells you matched and linked is displayed as **Linked**.

   **Note:** Target cell linkages are not saved in the database until you save the flowchart. If you cancel changes in the flowchart, cell linkages are not saved to the database.

## To link flowchart cells to target cells using the process configuration dialog

Before you do this, make sure placeholder cell codes and names exist in the target cell spreadsheet for the campaign.

1. In a flowchart in **Edit** mode, double-click the process whose output cell(s) you want to link to cell(s) in the target cell spreadsheet. You see the process configuration dialog for the process.

2. Click the **General** tab. You see the general information for the process.

3. Access the Select Target Cell window.

   - In processes that output a single cell, such as Select, click **Link to Target Cell...**.

   - In processes that output multiple cells, such as Segment, click the **Output Cell Name** or **Cell Code** row for each cell that you want to link. Click the ellipsis button that appears.

   You see the Select Target Cell window, displaying the cells defined in the target cell spreadsheet for the current campaign.

4. In the Select Target Cell window, select the row for the cell to which you want to link the current output cell.

5. Click **OK**. The Select Target Cell window closes. The Output Cell Name and Cell Code in the process configuration dialog are replaced with the code and name of the cell in the target cell spreadsheet. These are italicized, indicating that they are linked to the target cell spreadsheet.

6. Click **OK**. The process configuration dialog closes and your changes are saved.

## To unlink flowchart cells from target cells using the process configuration dialog

**Important:** Unlinking cells that have associated contact history causes these cells to be "retired". Because retired cells are not displayed in the target cell spreadsheet, they will no longer be visible there. To retain cells in the target cell spreadsheet, delete contact history for the cell before unlinking it.

1. In a flowchart in **Edit** mode, double-click the process whose output cell(s) you want to unlink from cell(s) in the target cell spreadsheet. You see the process configuration dialog for the process.

2. Click the **General** tab. You see the general information for the process.

3. Access the Select Target Cell window.

   - In processes that output a single cell, such as Select, click **Link to Target Cell....**

   - In processes that output multiple cells, such as Segment, click the **Output Cell Name** or **Cell Code** row for the cell that you want to unlink. Click the ellipsis button that appears.

   You see the Select Target Cell window, displaying the cells defined in the target cell spreadsheet for the current campaign. The currently linked cell is highlighted.

4. In the Select Target Cell window, select **[Not Linked]**. The cell name and code are no longer highlighted.

5. Click **OK**. The Select Target Cell window closes. The Output Cell Name and Cell Code in the process configuration dialog are no longer italicized, indicating that they are not linked to the target cell spreadsheet.

6. Click **OK**. The process configuration dialog closes and your changes are saved.

## To assign an offer to a cell in a flowchart CSP

Before you can do this, you must have created the offers and cells.

1. In a flowchart in **Edit** mode, double-click the process whose output cell(s) you want to assign an offer(s). You see the process configuration dialog for the process.

2. Click the **Treatment** tab. You see the offer assignment interface for the process, with a grid displaying all input cells to the process.

3. If you want to use control groups that are completely excluded from contact, check the **Use Holdout Control Groups** checkbox. Columns relevant for control groups are added to the target cells grid.

4. For each cell, click in the **Control?** column and indicate whether this cell is a control cell or not by choosing **Y** or **N**. If you specify that a cell is a control cell, the remaining columns for that cells are disabled, and you cannot specify a control cell or an offer for that cell. If you specify that a cell is not a control cell, you can specify a control cell and an offer for the cell.

5. For each non-control cell, specify a cell that will be a control, and one of more offers.

   There are two ways to assign offers:

   - Click the cell's **Offer** column to view and select from a list of available offers or multiple offers;

   - Click **Assign Offers...** to open the Assign Offer(s) window, where you move offers from the Available Offers list to the Assigned Offers list using the **Add>>** and **<<Remove** buttons.

**Note:** To assign one or more offers to multiple cells, select all rows to which you want to assign offers, and click **Assign Offers...** to open the Assign Offer(s) window.

6. When you have finished assigning offers to the cells in the process, click **OK**. The process configuration dialog closes and your changes are saved.

## Assigning offer lists to cells

You assign an offer list to a cell in the same way as you assign a single offer or multiple offers to a cell, whether from a flowchart or in the target cell spreadsheet. However, you cannot specify the values for parameters in offers within the offer list. The default values for parameterized offer fields are used.

## To set parameters in offers assigned to cells

After you assign offers to cells in flowchart contact-style processes (CSPs), you can specifying the values for parameterized attributes in the assigned offers.

1. In a flowchart in **Edit** mode, double-click the process for whose input cell(s) you want to set the values for parametized offer attributes. You see the process configuration dialog for the process.

2. Click the **Parameters** tab. You see the interface for specifying the parameter values for each input cell.

3. In the **For Cell(s)** field, use the drop-down list to select a particular cell by name, or select **[All Cells]** to assign the same parameter values to more than one cell. You can also click the ellipsis button to open the **Select Cells to Use** window, in which you can select the cells you want to use as input.

   For the cell that you selected or for all cells, you see one row for each offer/parameter combination

   **Note:** Selecting **[All Cells]** provides the conglomerate view of cells/offers/parameters.

4. For each offer/parameter combination, click the **Assigned Value** column to display the available values in a drop-down list (if applicable), or edit the text in the field. For every cell that received the offer, the parameter value is set to the value you enter.

   **Note:** If you have more than one cell, all assigned to the same offer but with different values for the same parameter, one row is displayed for that offer, but the value [Multiple Values] is displayed under the **Assigned Value** column.

5. When you have finished specifying the values for offer parameters, click **OK**. The process configuration dialog closes and your changes are saved.

## About the target cell spreadsheet

**Note:** If your Campaign environment is integrated with Marketing Operations, you must use Marketing Operations to work with target cell spreadsheets. If your Campaign environment is configured to access legacy campaigns, use the instructions in this guide to work with target cell spreadsheets for legacy campaigns. For more information, see "About integration with IBM Unica Marketing Operations" on page 4.

The target cell spreadsheet (TCS) is a spreadsheet-type feature for each campaign that displays all cells used in flowcharts within that campaign, and their details,

including assigned offers. In addition to providing an accessible view of all cells as used in the campaign's flowcharts, it is a tool for cell-based offer assignment.

The target cell spreadsheet can be edited at any time, and writes values to the Campaign system tables when it is saved.

It can be used in two modes:

- **Top-down** — you create all target and control cells in the target cell spreadsheet, then later link them to cells created in flowcharts using their cell codes. For cells created within the TCS, all fields except those that are "**Used in Flowchart**" can be edited in the TCS.
- **Bottom-up** — each target cell that you create in a flowchart process is displayed in the TCS after you save the flowchart. For cells created from flowcharts, only the custom attributes can be edited in the TCS.

You can switch between the two modes at any time, although in general this will not be done often, because the top-down and bottom-up definition tasks are likely to be performed by different people.

**Important:** You should put in place business rules that minimize the possibility of a target cell spreadsheet being edited when any of the flowcharts in the associated campaign are being edited or run. Incorrect data might be saved and conflicts can arise if edits are made to the flowchart and the TCS by different users at the same time, for example, if one user is editing contact processes from within a flowchart, while another user is changing offer assignments for the same cells from the TCS.

However, in some cases you will need to switch between modes. For example, if you are working in a flowchart and find that a target cell has not been defined in the TCS in top-down mode, you can save the flowchart, then switch to top-down mode (go to the TCS and create the cell there), then switch back to bottom-up mode (go back to the flowchart and link to the new cell in the TCS. The contact process then configures successfully).

Cells created in the TCS in top-down mode never are visually disabled (grayed out) if they are unused in bottom-up mode.

## Cell status information in the target cell spreadsheet

The target cell spreadsheet in Campaign displays the current status of each cell, including the cell count, last run type (production or test run of a flowchart, branch, or process), and the last run time. The cell count is the number of unique audience IDs for each cell that is linked to an output cell in a flowchart that has been run. This cell status is the result of the latest saved production or test run of the corresponding process.

Cell status information displays in the target cell spreadsheet in either Campaign (stand-alone) or Marketing Operations (when integrated).

### Updating the cell counts

If you make changes to a process configuration, any previous run results are lost and the **Cell Count**, **Last Run Type** and **Last Run Time** columns appear blank in the target cell spreadsheet. You must run the flowchart, branch, or process in production or test mode and subsequently save the flowchart to update the cell count.

Note the effect on the cell counts in the TCS for the following types of process configuration changes.

- **Linking a flowchart output cell to a target cell.** The cell count remains blank until the next saved production or test run.
- **Unlinking a flowchart output cell from a target cell.** Any previous run results are removed and the cell count is blank.

### To refresh the cell counts manually

The cell counts in the target cell spreadsheet are updated automatically when you run the flowchart, branch, or process in production, or when you save a test run. If the TCS is open when the run completes, you must refresh the cell counts manually by clicking the **Get Cell Status** icon.

## Working with the target cell spreadsheet

See the following topics for information on working with the target cell spreadsheet (TCS):

- "To add one row to the target cell spreadsheet"
- "To add multiple empty rows to the target cell spreadsheet"
- "To duplicate rows in the target cell spreadsheet" on page 144
- "To search in the target cell spreadsheet" on page 144
- "To specify whether the current cell is a control cell" on page 144
- "To specify a control cell for the current cell" on page 145
- "To generate and use cell codes in the target cell spreadsheet" on page 145
- "To edit the target cell spreadsheet" on page 145
- "To paste data from an external source into the target cell spreadsheet" on page 146
- "To assign offers to cells in the target cell spreadsheet" on page 148
- "To unassign offers from cells in the target cell spreadsheet" on page 149
- "To view assigned offers or offer lists" on page 149

### To add one row to the target cell spreadsheet

1. In the campaign for which you want to add a cell, click the **Target Cells** tab.
   The target cell spreadsheet for the current campaign appears.
2. Click the **Edit** icon.
   The spreadsheet appears in **Edit** mode. Existing cells that are used in flowcharts are highlighted in color.
3. Click the **Add a Cell** icon.
   One row is added to the bottom of the spreadsheet.

### To add multiple empty rows to the target cell spreadsheet

1. In the campaign for which you want to add cells, click the **Target Cells** tab.
   The target cell spreadsheet for the current campaign appears.
2. Click the **Edit** icon.
   The spreadsheet appears in **Edit** mode. Existing cells that are used in flowcharts are highlighted in color.
3. Click the **Add Many Cells** icon and select **N empty rows** from the drop-down list. The Add Multiple New Rows window appears.
4. In the Number of Rows to Create field, enter the number of rows you want to add.

5. Click **Create Target Cells**.

   You see the new target cell rows added to the bottom of the spreadsheet, with the cell code and cell name already populated.

6. Enter any additional information you have for the new cells in the spreadsheet, then click **Save** or **Save and Return** to save your changes.

### To duplicate rows in the target cell spreadsheet

1. In the campaign for which you want to duplicate cells, click the **Target Cells** tab. The target cell spreadsheet for the current campaign appears.

2. Click the **Edit** icon.

   The spreadsheet appears in **Edit** mode. Existing cells that are used in flowcharts are highlighted in color.

3. Select the row that you want to duplicate.

4. Click the **Add Many Cells** icon and select **N duplicate rows** from the drop-down list.

   The Add Multiple New Rows window appears.

5. In the **Number of Rows to Create** field, enter the number of rows you want to add.

6. Click **Create Target Cells**.

   You see the new target cell rows added below your selected row, with the cell code and cell name already populated. All other column values except **Used in Flowchart** are copied from your original cell row.

7. Enter any additional information you have for the new cells in the spreadsheet, then click **Save** or **Save and Return** to save your changes.

### To search in the target cell spreadsheet

The Search function in the target cell spreadsheet allows you to enter a partial string and find matches in any column of the spreadsheet. For example, entering "924" in the search field will match both the row containing the cell with code "A0000000924" as well as the row for a cell assigned to an offer named "Offer9242007."

**Note:** The search function is only available in Edit mode in the target cell spreadsheet.

1. In the campaign for which you want to search for cells, click the **Target Cells** tab.

   The target cell spreadsheet for the current campaign appears.

2. Click the **Edit** link in the spreadsheet.

   The spreadsheet appears in **Edit** mode. Existing cells that are used in flowcharts are highlighted in color.

3. Click **Search**.

4. In the Find window, enter the string for which you want to search, then click **Find String**.

   The row containing the first match found for your search string is highlighted.

5. Click **Find Next** to continue finding matches in the spreadsheet.

### To specify whether the current cell is a control cell

1. In the target cell spreadsheet in **Edit** mode, click in the **Control Cell** column for the cell you are editing.

   The cell becomes editable, with a drop-down list.

2. Select **Yes** or **No** from the drop-down list to indicate whether the current cell is a control cell.
3. Click **Save** or **Save and Return** to save your changes.

**Important:** If you assign a control cell (for example, Cell A) as the control for one or more target cells, then subsequently change the Cell A to a target cell, Cell A is removed as a control from any target cells that previously used it as a control.

### To specify a control cell for the current cell

1. In the target cell spreadsheet in **Edit** mode, click in the **Control Cell Code** column for the cell you are editing.

   The cell becomes editable, with a drop-down list. Cell codes for any cells designated as control cells (in other words, that have a value of **Yes** in their Control Cell column) are available to be selected as control cells.
2. Select the cell to be used as a control for the current cell from the drop-down list.
3. Click **Save** or **Save and Return** to save your changes.

### To generate and use cell codes in the target cell spreadsheet

Use this feature to have Campaign generate a unique cell code for use in the target cell spreadsheet.

1. In the target cell spreadsheet in **Edit** mode, click the **Generate Cell Code** icon.

   A window with the generated cell code appears.
2. Click inside the window and use your mouse to select the cell code.
3. Right-click and select **Copy** from the context menu.
4. Click the field in the target cell spreadsheet in which you want to paste the cell code.
5. Right-click and select Paste from the context menu. The generated cell code is pasted into the target cell spreadsheet.
6. Click **Save** or **Save and Return** to save your changes.

### To edit the target cell spreadsheet

When you edit the attributes of cells in the target cell spreadsheet at any time, be careful that you are not doing so at the same time that any flowcharts in the associated campaign are being edited or run.

**Important:** Incorrect data might be saved and conflicts can arise if edits are made to the flowchart and the TCS by different users at the same time, for example, if one user is editing CSPs from within a flowchart, while another user is changing offer assignments for the same cells from the TCS.

1. In the campaign for which you want to edit cells, click the **Target Cells** tab.

   The target cell spreadsheet for the current campaign appears.
2. Click the **Edit** icon.

   The spreadsheet in **Edit** mode appears. Existing cells that are used in flowcharts are highlighted in color.
3. Click the cell field(s) that you want to edit, and make your changes.
4. Use the icons on the Campaign toolbar to move a selected row in the spreadsheet up or down, or to delete selected rows.
5. When you have finished making your edits, click **Save** or **Save and Return** to save your changes.

## To paste data from an external source into the target cell spreadsheet

1. In the campaign for which you want to edit cells, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.

2. Click the Edit link in the spreadsheet. You see the spreadsheet in Edit mode. Existing cells that are used in flowcharts are highlighted in color.

3. In your external application, copy the cell contents or text that you want to paste into the target cell spreadsheet.

4. In the target cell spreadsheet in **Edit** mode, click the cell in which you want to paste the copied contents or, to select multiple cells, click and hold the **Shift** key while selecting cells.

5. Right-click and select Paste from the context menu. Your copied cell contents are pasted into the selected cell(s).

6. Click **Save** or **Save and Return** to save your changes.

## To import data from a .csv file into the target cell spreadsheet

You can import large amounts of target cell data into the Target Cell Spreadsheet from a file in .csv format. The file must be formatted as specified in "Required Format for .csv File For Importing to TCS".

1.  In the campaign for which you want to import target cell data, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.

2. Click the **Import Target Cells** icon in the spreadsheet.

3. In the **Import TCS** dialog, use the **Browse** button to navigate to the .cvs file that you want to import, select the file, and click **Open** in the **Choose file** dialog.

4. Click **Import**.

5. The Target Cell Spreadsheet refreshes, with the contents of the .csv file appended below any existing cells in the TCS.

## Required Format for CSV File to Import to the Target Cell Spreadsheet

To successfully import data to the Target Cell Spreadsheet, the comma-separated values (.csv) file that you prepare must match the following format. When you export the contents of the Target Cell Spreadsheet, this is also the format in which data is exported.

- The file must contain a header row with column names matching the predefined and custom cell attributes.
- Each row must have the same number of columns as specified in the header row.
- If there is no data for a given column, it should be left blank.
- Values of custom attributes will be converted to the appropriate data type. For dates, the date string must be in the user's locale format.

| Column Name | Description | Required | Valid Values |
|---|---|---|---|
| CellName | Name of the target cell. | Yes | |
| CellCode | Cell code assigned to this target cell. If empty, Campaign will generate a cell code, otherwise the specified value will be used. | Yes, if this row is marked as IsControl = Yes. | Cell code must match the defined cell code format. |

| Column Name | Description | Required | Valid Values |
|---|---|---|---|
| IsControl | Indicates whether the cell in this row is a control cell or a regular target cell. | No | Yes, No |
| ControlCellCode | The CellCode of a cell that is marked as IsControl = Yes. | No | A valid cell code that exists for a call marked as IsControl = Yes. |
| AssignedOffers | A semicolon-delimited set of offers, offer lists, or a combination of both. | No | Offers can be specified using offer codes, and offer lists can be specified using offerlist names.The format is: `OfferName1[OfferCode1];` `OfferName2[OfferCode2];` `OfferListName1[];` `OfferListName2[]`, where the offer name is optional, but the offer code is required, and the offer list name is required with empty square brackets. |
| FlowchartName | Name of the associated flowchart. | No. This column will be populated by Campaign. If specified, it will be ignored. Will be populated for export. | |
| CellCount | The counts for this cell. | No. This column will be populated by Campaign. If specified, it will be ignored. Will be populated for export. | |
| LastRunType | The type of the last flowchart run. | No. This column will be populated by Campaign. If specified, it will be ignored. Will be populated for export. | |

| Column Name | Description | Required | Valid Values |
|---|---|---|---|
| LastRunTime | The time of the last flowchart run. | No. This column will be populated by Campaign. If specified, it will be ignored. Will be populated for export. | |
| Custom Attr1 | Add a column for each custom cell attribute you have defined for which you are importing data. | No | Valid values as required by the custom attribute's data type and user locale/format. |

## To export data from the target cell spreadsheet

You can export the contents of the Target Cell Spreadsheet in .csv format to a location on your local or networked drive. The entire contents of the TCS is exported; you cannot select a subset of the contents.

1. In the campaign for which you want to export TCS contents, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.
2. Click the **Export Target Cells** icon.
3. In the File Download dialog, click **Save**.
4. In the **Save As** dialog, specify a file name for the file, navigate to the directory where you want to save it, and click **Save**. The File Download dialog indicates that the download is complete.
5. Click **Close** to return to the Target Cell Spreadsheet.

## To assign offers to cells in the target cell spreadsheet

You can assign offers to cells in "top down" mode in the target cell spreadsheet.

1. In the campaign for which you want to assign offers to cells, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.
2. Click the **Edit** link in the spreadsheet. You see the spreadsheet in Edit mode. Existing cells that are used in flowcharts are highlighted in color.
3. In the target cell spreadsheet in **Edit** mode, click the **Assigned Offer(s)** column in the row for the cell to which you want to assign offers.

   You see the **Search Offers** icon.
4. Click the **Search Offers** icon.

   You see the Select Offer(s) window.
5. In the Select Offer(s) window, navigate through the offer folders to select one or more offers or offer lists, or click the **Search** tab to find an offer by name, description, or code.
6. When you have selected the offer(s) you want to assign to the current cell, click **Accept and Close**.

   The Select Offer(s) window closes, and the **Assigned Offer(s)** column is populated with your selected offer(s).
7. When you have finished assigning offers to cells, click **Save** or **Save and Return** to save your changes.

## To unassign offers from cells in the target cell spreadsheet

After you have assigned offers to cells, you can unassign them.

1. In the campaign for which you want to unassign offers from cells, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.
2. Click the **Edit** link in the spreadsheet. You see the spreadsheet in Edit mode. Existing cells that are used in flowcharts are highlighted in color.
3. In the target cell spreadsheet in **Edit** mode, click the **Assigned Offer(s)** column in the row for the cell for which you want to unassign offers.

   You see the **View Offers** icon.
4. Click the **View Offers** icon.

   You see the View/Edit Offer Details window, with the assigned offers or offer lists in the Assigned offers section.
5. Select the offer(s) or offer list(s) that you want to remove from the cell, and click the **>>** button to move the selected items to the Removed offers section.
6. When you have finished removing offers or offer lists, click **Accept Changes**.

   The View/Edit Offer Details window closes and the removed offer(s) or offer list(s) are no longer displayed in the Assigned Offer(s) column for the cell.
7. When you have finished unassigning offers from cells, click **Save** or **Save and Return** to save your changes.

## To view assigned offers or offer lists

After you have assigned offers or offer lists to cells, you can view the assigned offers or preview the contents of assigned offer lists.

1. In the campaign for which you want to view the offers or offer lists assigned to cells, click the **Target Cells** tab. You see the target cell spreadsheet for the current campaign.
2. Click the **Edit** link in the spreadsheet. You see the spreadsheet in Edit mode. Existing cells that are used in flowcharts are highlighted in color.
3. In the target cell spreadsheet in `Edit` mode, click the **Assigned Offer(s)** column in the row for the cell for which you want to view assigned offers or offer lists.

   You see the **View Offers** icon.
4. Click the **View Offers** icon.

   You see the View/Edit Offer Details window, with the assigned offers or offer lists displayed in the Assigned offers section.
5. Select an offer list and click **Offer List Preview**.

   You see the Summary page for the selected offer list, displaying the preview of included offers.

## Target Cells tab icons

The Target Cells tab uses the following icons.



The icons, left to right, are described in the following table.

*Table 16. Icons for Target Cells tab*

| Icon Name | Description |
|---|---|
| Edit | Click this icon to edit the target cell spreadsheet (TCS). **Note:** Editing the target cell spreadsheet requires the appropriate permission. For more information, see the *Marketing Platform Administrator's Guide*. |
| Import Target Cells | Click this icon to import the contents of a .csv file to the Target Cell Spreadsheet. |
| Export Target Cells | Click this icon to export the entire contents of this Target Cell Spreadsheet to a .csv file. |
| Get Cell Status | Click this icon to refresh the data in the target cell spreadsheet. |

# Chapter 9. Contact history and response tracking

In Campaign, the general term "contact history" refers to information captured about:

- **what offers** were sent
- to **which customers** (or accounts, or households, depending on audience level)
- by **which channel**
- on **what date**.

For example, a list of target customers for a campaign can be produced as the output of a contact process (such as Call List or Mail List) in the campaign's flowchart. Each of the target customers belongs to a cell that has been assigned one or more offers. When the Call List or Mail List process is run in production mode (not in test mode) with logging to contact history enabled, details are written to several tables in the Campaign system database.

Together, those tables comprise contact history, which records the specific offer version (including the values of parameterized offer attributes) given to each ID in each cell at flowchart run time, as well as the members of control cells, who are withheld from receiving any communications.

Control cells in Campaign are always hold-out or no-contact controls, therefore customers belonging to control cells cannot be assigned any offers, and are not included in contact process output lists (although they are written to the contact history tables).

## Contact history and audience levels

Campaign records and maintains a separate contact history and detailed contact history for each audience level defined by your system administrators. Each audience level has its own related contact history and detailed contact history tables in the Campaign system database, although these can be mapped to the same underlying physical table in the database.

For more details about contact history and audience levels, see the *Campaign Administrator's Guide*.

## Detailed contact history

When all members of a cell are treated the same (that is, when they are all given the same offer version(s), basic contact history is recorded. However, when different individuals in the same cell receive a different number of offers or different offer versions (when offers are personalized so that individuals in the same cell receive different offer versions), Campaign records exactly what each individual received in detailed contact history.

All control information is also recorded in detailed contact history, identifying the specific offer an individual would have received if they had not been selected to be in the hold-out control group. This information allows for appropriate analysis and comparison of the target versus control cell for lift and ROI calculations.

Detailed contact history can quickly grow very large, but it provides complete data to enable you to perform response tracking to a very detailed level, and to analyze targets and controls.

## Writing entries to contact history tables

Entries are written to the contact history tables only when a flowchart contact process (Call List or Mail List) runs in production mode with the contact logging options enabled. Test runs do not populate any contact history tables.

If you have the appropriate permissions, you can enable or disable logging to contact history in the configuration window for a contact process.

**Important:** For flowcharts containing contact processes, note that each production run of a flowchart can generate contact history only once. To generate multiple contacts from the same list of IDs, snapshot out the list of IDs and read from the list for each flowchart run. Another way is to use the same list of IDs as input to multiple contact processes.

When logging to contact history is enabled, contact history captures the following details:

- The date and time of the contact (by default, this is when the contact process was run);
- The offer version(s) assigned in the contact process, including parameterized offer attribute values;
- Exactly which offer version(s) were given to each ID;
- For target and control cells, the treatment codes for tracking each unique combination of offer version, cell, and date/time.

The production run of a flowchart contact process affects the following system tables:

- Treatment history (UA_Treatment)
- Base contact history (UA_ContactHistory)
- Detailed contact history (UA_DtlContactHist)
- Offer history

For more details about the system tables that are written to for contact history, see the *Campaign Administrator's Guide*.

### Treatment history (UA_Treatment)

Rows are added to the treatment history table (UA_Treatment) each time a flowchart is run in production mode. In other words, if you have a flowchart scheduled to run periodically, each new run generates a new set of treatments, one for each offer per cell, for both contact and control cells, at flowchart run time. Campaign thus provides the most granular tracking possible, by recording as a separate instance each time a treatment is generated.Treatment history works together with base contact history to provide a highly compressed and efficient way to store complete contact history information. The base contact history table (UA_ContactHistory) records only the cell membership information for the appropriate audience, while the treatment(s) given to each cell are recorded in the treatment history table (UA_Treatment).

Each treatment instance is identified with a globally unique treatment code that can be used in response tracking to directly attribute to a specific treatment instance.

Treatment history also records control cell data if controls are used. Rows pertaining to offers given to a target cell are called target treatments. Rows pertaining to offers given to a control cell are called control treatments. Target treatments will have an associated control treatment if a control cell was assigned to the target cell in the contact process. Each control treatment is also assigned a unique treatment code, although the codes are not distributed to hold-out control members. Control treatment codes are generated to facilitate custom response tracking where custom flowchart logic is used to identify a control: control treatment codes can be looked up and associated with the event so that the response can be attributed to an exact control treatment instance.

# Base contact history (UA_ContactHistory)

One row is written to the base contact history table for each combination of contact ID, cell, and flowchart run date/time, for target cells as well as control cells.

## Mutually exclusive cell membership

If your cells are mutually exclusive cells, and each ID can belong to only one cell, then each ID has one row in the contact history table when it is treated within a single contact process, regardless of the number of offers assigned. For example, this is the case if you define cells that correspond to "Low," "Medium," and "High" value segments, and customers can belong only to one of these segments at any given time. Even if the "High value" segment is given 3 offers in the same contact process, only one row is written to base contact history, since base contact history records cell membership.

## Non-exclusive cell membership

However, if individuals can belong to more than one target cell (for example, if each of your target cells receives offers based on different eligibility rules, and customers might qualify for none, one, or more than one of the offers), then each individual has the number of rows in the contact history table corresponding to the number of cells in which that individual is a member.

For example, if you define two cells: "Customers who have made purchases within the last 3 months," and "Customers who have spent at least $500 in the last quarter," an individual could be a member of one or both of these cells. If the individual is a member of both cells, two entries are written to the base contact history for that individual when the contact process is run.

Even if multiple rows are written to the contact history table for an individual because he or she belongs to more than one target cell, all offers given in the same contact process are considered to be a single "package" or interruption. A unique "package ID" in the contact history table groups together the rows written by a particular run instance of a specific contact process for an individual. Multiple "interruptions" to a person or household would occur only if the individual or household belonged to multiple cells in separate contact processes.

## Writing additionally tracked fields to contact history

You can create additionally tracked fields and populate them in the base contact history table. For example, you might want to write out the treatment code from the treatment table, or an offer attribute, as an additionally tracked field in contact history.

However, since it is cell membership that is being captured in base contact history, and each target or control cell writes one row per audience ID, note that if you are populating additionally tracked fields in base contact history with offer or treatment data, only the first treatment for each target or control cell is written out.

**Example**

| Cell | Associated control cell | Offer given to cell |
|------|-------------------------|---------------------|
| TargetCell1 | ControlCell1 | OfferA, OfferB |
| TargetCell2 | ControlCell1 | OfferC |
| ControlCell1 | - | - |

When the flowchart containing the contact process that assigns the listed offers to TargetCell1 and TargetCell2 is run in production (with writing to contact history enabled), a treatment is created for each combination of cell, offer given, and the run date/time. In other words, six treatments are created in this example:

| Treatments | Treatment Code |
|------------|----------------|
| TargetCell1 receiving OfferA | Tr001 |
| TargetCell1 receiving OfferB | Tr002 |
| ControlCell1 receiving OfferA | Tr003 |
| ControlCell1 receiving OfferB | Tr004 |
| TargetCell2 receiving OfferC | Tr005 |
| ControlCell1 receiving OfferC | Tr006 |

If you have added Treatment Code as an additionally tracked field in base contact history, only the first target or control treatment for each cell is written out. In this example, therefore, only three rows are written to base contact history, for the first treatment for each cell:

| Cell | Treatment Code |
|------|----------------|
| Target Cell1 | Tr001 |
| ControlCell1 | Tr003 |
| TargetCell2 | Tr005 |

For this reason, capturing offer-level attributes in the base contact history table may not be a good practice, since it will only provide complete contact information if:

- only one offer is assigned to any target cell; and
- each control cell is assigned to only one target cell.

In any other instance, only data associated with the first treatment (or control treatment) is output. An alternative is to use a database view to flatten and provide access to offer-level information by joining the UA_ContactHistory and UA_Treatment system tables. You can also output this information to alternate contact history.

**Note:** In detailed contact history and alternate contact history, the behavior is different; a row is written for each treatment (rather than a row for each cell). Therefore, if you output offer attribute information as additionally tracked fields, complete treatment information can be displayed as rows are written out for all treatments.

### Updates to contact history

New entries to the contact history table are appended after existing entries. You can manually clear selected entries using the **Clear History** function.

## Detailed contact history (UA_DtlContactHist)

The detailed contact history table is written to only if you are using a scenario where individuals within the same cell receive different versions of an offer. For example, members of the same cell might receive the same mortgage offer, but the offer can be personalized so that Person A receives a 5% rate offer, while Person B receives a 4% rate offer. Detailed contact history contains one row for each offer version that an individual receives, as well as one row for each control cell based on the offer versions they would have received.

## Offer history

Offer history is comprised of multiple system tables which collectively store the exact information about an offer version that has been used in production. New rows are added to the offer history table only if the combination of parameterized offer attribute values are unique. Otherwise, existing rows are referenced.

For more details about the contact history tables, see the *Campaign Administrator's Guide*.

## Disabling writing to contact history

**Important:** It is possible to disable writing to contact history, but the best practice is not to disable contact history loggin. If you execute a campaign in production and do not log to contact history, you will be unable to accurately re-generate this history at a later date if any underlying data changes.

However, you can run contact processes without writing to contact history tables in two ways:
- "Performing a test run"
- "To disable logging options" on page 156

## Performing a test run

Entries are written to the contact history tables only when a flowchart contact process (Call List or Mail List) runs in production mode with the contact logging options enabled. Test runs do not populate any contact history tables.

## To disable logging options

Each contact process can be configured to disable logging to contact history during production runs.

1. Double-click the contact process for which you want to disable logging to contact history. You see the process configuration dialog.

2. Click the **Log** tab. You see the window for configuring logging of contact transactions.

3. To prevent any logging to contact history, clear the **Log to Contact History Tables** and the **Log into Other Destinations** checkboxes.

   Optionally, you can also click **More Options** to see the Contact History Logging Options window. This window provides additional control over which information is logged to the contact history. See "To configure a contact process (Mail List or Call List)" on page 73 for more information.

4. Click **OK**. The process configuration dialog closes and your changes are saved. When you run this contact process, no entries will be written to the contact history tables or to alternate logging destinations until these options are re-enabled.

# Clearing contact and response history

You might want to clear contact or response history records if, for example, a production run was executed by mistake, or if, after a production run, you decide to cancel the campaign.

**Important:** Clearing contact and response history permanently deletes this data from the database. Cleared contact and response history cannot be recovered. If later recovery might be required, back up the system table database prior to clearing any history.

Referential integrity across all Campaign system tables is always preserved. All contact history tables are written to simultaneously, and any clean up of contact history is also done simultaneously across all contact history tables. For example, treatment table entries cannot be deleted if there entries in the base or detailed contact history tables referencing them.

You can clear contact history only if you have the appropriate permissions to do so, and if there are no associated response history records. Therefore, if you clear contact history you must also clear the associated response history.

**Important:** In typical situations, it is best not to delete contact history for which responses have been recorded. However, if you must delete such contact history, you can choose to clear all associated contact and response history records, or clear only the response history records.

## To clear contact history and response history

**Important:** Clearing contact history permanently deletes contact history records from the system tables. This data is not recoverable.

1. In a flowchart in Edit mode, double-click the contact process for which you want to clear history. You see the process configuration dialog.

2. Click the **Log** tab. You see the window for configuring logging of contact transactions.

3. Click **Clear History**. You see the Clear Contact History window.

   **Note:** If no contact history entries exist, when you click **Clear History** an error message indicates that there are no entries to clear.

4. Choose the appropriate option for clearing history: all entries, all entries between a selected date range, or specific flowchart runs, identified by the run date and time.

5. Click **OK**.

   - If no response history records exist for the entries you selected, you see a confirmation message.
   - If response history records exist for any of the entries you selected, you see the Clear History Options window. Select one of the following options:
     – **Clear All Associated Contact and Response History Records**: Both contact history and response history are cleared for the entries you specified.
     – **Clear Associated Response History Records Only**: Only response history is cleared for the entries you specified. Contact history records are not cleared.
     – **Cancel**: No contact history or response history records are cleared.

6. When the selected action is completed, a confirmation message indicates that the specified records have been cleared.

7. Click **OK** to close the confirmation message.

8. Click **OK** to close the process configuration dialog.

# About response tracking

In Campaign, the term "response tracking" refers to the process of determining whether events or actions taken by individuals are in response to offers they have been given. Response tracking also includes tracking the behavior of individuals in hold-out control groups, to see whether they performed the desired action despite not having been contacted.

Campaign captures the following information about responses to campaigns:
- who responded — the list of audience entities (such as individual customers or households) whose behavior matched the response types being tracked.
- the actions they performed, and the date and time of these actions — for example, a click-through on a Web site, a purchase, or purchase of a specific item.
- which offer treatment they responded to — any Campaign-generated codes (campaign, offer, cell or treatment code) as well as any offer attributes with non-null values returned by the respondent are matched for response tracking.
- how their response is counted — determine how responses are credited to the campaign based on matching Campaign-generated codes or non-null values for offer attributes, whether respondents were in the original targeted group or a control group, and whether the response was received before the expiration date.

## Performing response tracking

You perform response tracking by creating a flowchart containing the Response process, which takes input from an action table via a Select or an Extract process. The action table is simply a file or table containing a record of all the actions or events that are evaluated to see if they should be attributes as responses to any contact or control treatments.

You configure the Response process to process, evaluate, and output the IDs that you consider as responses to your offer, based on matching some combination of response codes and/or other standard or custom offer attributes from the action table. Any Campaign-generated codes (campaign, offer, cell or treatment code) that are mapped in the Response process are considered to be "response codes of interest." Any other offer attributes, whether standard or custom, that are mapped in the Response process are considered "response attributes of interest." For example, you can use the "Relevant Products" field as an offer attribute to track inferred responses. The response processing logic uses both response codes of interest and response attributes of interest to determine direct and inferred responses.

Running the Response process writes those responses to the response history system table (UA_ResponseHistory, or its equivalent for each audience level). Like contact history, there is one response history system table for each audience level that you are tracking.

The data captured in the response history is then available for analysis using the performance reports in Campaign.

Campaign automatically records the following data related to response tracking:
- Whether the response was direct (one or more Campaign-generated codes were returned) or inferred (no response codes were returned)
- Whether the response was received before or after the expiration date of the specific offer version
- Whether the respondent was in a target cell or a control cell from the campaign
- Whether the response was unique or a duplicate
- Best, fractional, and multiple attribution scores
- The response type (action) attributed to the response

## Using multiple response tracking flowcharts

It is possible to have a single response tracking flowchart for all the campaigns in your corporation. If a single action table is used, your system administrator will typically have set up session flowcharts to write data into the action table for processing.

However, your implementation of Campaign might use one or more action tables for convenience, each related to a separate response tracking flowchart.

You might use multiple response tracking flowcharts when:
- You are tracking responses for different audience levels
- You have real-time vs. batch processing requirements
- You want to avoid duplicating large volumes of data
- You want to hard-code specific data for different situations
- You need custom response processing logic

### You are tracking responses for different audience levels

(Required) You need one response tracking flowchart for each audience level for which you receive and track responses. The Response process operates at the audience level of the incoming cell, and automatically writes to the appropriate reponse history table for that audience level. To track responses for two different audience levels, for example, customer and household, you need two different

Response processes, most likely in two separate response tracking flowcharts.

## You have real-time vs. batch processing requirements

(Required) Most of your response tracking sessions will be batch flowcharts, periodically processing events populated into an action table (for example, nightly processing of customer purchases). The frequency of response tracking runs will depend on the availability of the transaction data used to populate the action table.

For example, if you process responses from different channels (such as web vs. direct mail), you might need separate response processing sessions because the frequency of availability of incoming transaction data will be different for each channel.

## You want to avoid duplicating large volumes of data

(Optional) If you have large transaction volumes (such as millions of sales transactions per day) that must be evaluated, you might want to build a response tracking flowchart to map directly against the source data, rather than ETL (extract, transform, load) it into an action table.

For example, you can build a response tracking flowchart in which an Extract process pulls transactions directly from an e-commerce system's purchase transaction history table (based on a particular date range), and a Response process that maps directly to columns in this table from this extract.

## You want to hard-code specific data for different situations

(Optional) You might want to hard-code specific data (such as response types) for different situations, such as different channels. For example, if you are interested specifically in tracking a specific response type (such as "inquiry") that is specific to a channel (such as "call center"), you can create a derived field to filter these responses, and use it in a response processing flowchart to pull all inquiries from the call center database. It might be more convenient to create the data necessary for response tracking using derived fields, and pull the data directly from the source, than to write the data to a single action table.

## You need custom response processing logic

(Optional). If you need to write your own rules for attributing responses, you can create a separate response tracking flowchart to implement custom response-tracking logic. For example, if you need to identify responders to a "Buy 3 Get 1 Free" offer, you need to look at multiple transactions to determine whether an individual qualifies as a responder. Upon finding qualifying individuals, you can then input them into a Response process to record the responses using the treatment code and appropriate response type.

## Response tracking using multi-part offer codes

You can track responses using a derived field that consists of a multi-part offer code (that is, an offer code that consists of two or more codes). All parts of the offer code must be concatenated using the partition-wide `offerCodeDelimiter` configuration property. The following example creates a derived field called `MultipleOfferCode` consisting of two parts concatenated using the default delimiter "-":

```
MultipleOfferCode = string_concat(OfferCode1, string_concat("-",
OfferCode2))
```

When configuring the Response process to use the derived field as a Candidate
Action Field, you must match the derived field to the offer/treatment attribute of
each offer code in the multi-part code.

## Date scope for response tracking

In addition to recording whether responses were made within the valid offer time
period (that is, after the effective date and on or before the expiration date),
response tracking also records whether the response was outside a valid date range
for all offers. Campaign tracks late responses for all offers based on a configurable
time period after an offer's expiration date to provide data on how often your
offers are redeemed after their official end dates.

The date scope for response tracking in Campaign is set globally, and is applied to
all campaign offers. Your system administrator sets the number of days past the
offer expiration date that responses will be tracked.

This date setting automatically limits the possible treatment instances that can
match an event. The smaller the date scope, the more performance is improved
because fewer instances from the treatment table are returned for possible matches.

For details about setting the date scope, see "Setting the number of days after a
campaign ends to record responses" in the *Campaign Adminstrator's Guide*.

## Response tracking for controls

Control group responses are tracked simultaneously with offer responses, using the
Response process.

Control cell responses are handled in the same way as inferred responses, except
that any response codes are first discarded. For any responses from control cell
members, any response tracking codes are ignored and any attributes of interest
(for example, relevant products) are checked for matches against control treatment
instances. Campaign uses an internal, globally-unique treatment code that is
generated for all control treatments; however, control treatment codes are not given
out, as control treatments are always no-contact, hold-out controls.

It is possible for the same event to credit both target treatment instances and
control treatment instances. For example, if a particular customer is targeted with
an offer for 10% of any purchase in the women's department, and that customer is
also a member of a hold-out control group monitoring for any purchase from the
store, if that customer makes a purchase using the coupon, that event would be
associated with both the target treatment instance (using the coupon's treatment
code) and the control treatment instance. Control treatment instances are also
marked within the valid date range or after the expiration date, in the the same
manner as target treatment instances — this provides a valid control comparison
for late activity in the target cell.

Best or fractional attribution is not used for control cell responses — multiple
attribution is always used. In other words, if a respondent is in a control cell for an
offer and her action qualifies as an inferred response for multiple control
treatments, all of these matching control treatments are credited for the response.

### Response tracking for personalized offers

If you have used data-driven, personalized, or derived or parameterized offer fields to generate different offer versions, for responses to these personalized offers to be correctly attributed, your action table must contain fields representing the parameterized offer attribute fields. When these fields are mapped in a Response process as attributes of interest and populated, they can be used to match responses back to the offer version or treatment instance. Responses with values for these "attributes of interest" must exactly match the values recorded for that individual in offer version history, for attribution to that treatment.

For example, if you had flight offers which were personalized with an origin airport and a destination airport, then your action table should contain fields for "Origin Airport" and "Destination Airport." Each flight purchase transaction would contain these values, and response tracking would be able to match the specific flight purchased by an individual to the offer version(s) that were promoted to him or her. These fields also would be used to track inferred responses for members of the control group, to see if they purchased any flights that would have been promoted to them.

## Response types

Response types are the specific actions that you are tracking, such as click-through, inquiry, purchase, activation, use, and so on. Each response type is represented by a unique response code. Response types and codes are defined globally in the Campaign Response Type system table, and are available for all offers, although not all response types are relevant for all offers. For example, you would not expect to see a click-through response type for a direct mail offer.

When events are written to the action table, each event row can have only one response type. If the response type field is empty (null) for an action, it will be tracked as the default response type ("unknown").

If a single event needs to be associated with multiple response types, multiple rows must be written to the action table, one for each response type. For example, if a financial institution is tracking the purchase usage level of a new credit card during the first month after activation with response types of "Purch100," "Purch500," and "Purch1000," a purchase of $500 might need to generate an event with response types of both "Purch100" and "Purch500," because the purchase meets both of these conditions.

If you need to detect complex sequences of separate transactions that will together constitute a response event, you will need a separate monitoring session that looks for the qualifying transactions and, when these are found, then submits an event to the action table. For example, if a retailer's promotion rewards customers who purchase any three DVDs during the month of December, you can build a flowchart to compute the number of DVD purchases for each customer, select the customers who have made three or more purchases, and write these customers to the action table with a special response type (such as "Purch3DVDs").

For more details about response types, see the *Campaign Administrator's Guide*.

## Response categories

Responses in Campaign fall into two categories:

- Direct response — one or more Campaign-generated tracking codes sent out with the offer were returned, and any returned attributes of interest must match.
- Inferred response — no tracking codes were returned, but at least one offer attribute used for response tracking was returned and matched. Responses from hold-out control groups are always inferred responses.

## Direct responses

A response is considered to be a direct response if:

- The respondent returned at least one Campaign-generated code (campaign, cell, offer, or treatment code) that exactly matches one or more of the possible target treatment instances generated by Campaign.

  AND

- Any "attributes of interest" (that is, any offer attribute, standard or custom, that was mapped in the Response process for tracking) returned must have a value exactly matching the value of attribute in the treatment.

For example, if treatment code is a response code of interest and "Response Channel" is an attribute of interest, an incoming response with the values of "XXX123" for treatment code and "retail store" for Response Channel will not be considered a direct match for a treatment with the respective values of "XXX123" and "Web."

A response with a null value for an attribute of interest cannot match a treatment that has that offer attribute. For example, a response that is missing a value for "interest rate" cannot match any offer created from an offer template that contains interest rate as an offer attribute.

However, a response with a value for an attribute of interest that does not exist in a treatment does not prevent a match. For example, if a Free Shipping offer was created from an offer template without an "interest rate" offer attribute, and "interest rate" is an attribute of interest, the value of the "interest rate" attribute for an incoming response does not matter when Campaign considers possible matches against treatments associated with the Free Shipping offer.

Response tracking considers whether the response was made within the valid offer time period (that is, after the effective date and on or before the expiration date), or whether the response was outside the valid date range. Campaign tracks late responses for a configurable time period after an offer's expiration date.

Response tracking also identifies whether a direct response was from a respondent that was in the originally contacted group, that is, the target cell.

**Note:** If a direct response was not from the originally targeted group, then the response is considered a "viral" response or a "pass-along," meaning that the responder somehow obtained a valid response code although they did not originally receive the offer.

It can be valuable to understand how many of your responses came from your target group, especially if you are trying to cultivate high-value customers. These values can be broken out in performance reports to see how many direct responses came from the original target group and how many were viral responses.

Direct responses can be exact or inexact matches.

## Direct exact matches

A response is considered to be a direct exact match if Campaign can uniquely identify a single target treatment instance to credit.

**Note:** It is a best practice to use Campaign-generated treatment codes for tracking, because Campaign can always uniquely identify a treatment instance to credit if the treatment code is returned.

For example, if you used the treatment codes generated from a contact flowchart as coupon codes in an offer, and a treatment code is returned by a respondent in one of the offer's target cells, then the response is a direct exact match to that offer.

If multiple tracking codes or attributes or interest are received, all codes and attribute values must match exactly for the treatment instance to be counted. In other words, if a respondent provides an offer code, a treatment code, and an offer attribute with a non-null value, all must exactly match the codes and offer attribute values in the treatment.

## Direct inexact matches

A response is considered to be a direct inexact match if Campaign cannot uniquely identify a treatment instance to credit, but the returned tracking code(s) match multiple possible target treatment instances.

To narrow down target treatment instances that will receive credit for this response, if any target treatment instance contacted the responder, Campaign then discards any treatment instances that did not contact the responder. If no target treatment instances contacted the responder, all are kept, and all will receive credit for a viral response.

For example, if a customer in the high-value segment received an offer from a campaign which was given to both high and low-value customers and returned the offer code, this would initially match two target treatment instances (one for the high-value cell and one for the low-value cell). Applying this response tracking rule, since the treatment instance for the high-value cell actually targeted this responder but the treatment instance for the low-value cell did not, the latter is discarded. Only the treatment instance associated with the high-value customer group is credited for this response.

In addition, if the response date was within any of the remaining treatment instances' valid date range, any treatment instances not within their effective and expiration dates are discarded.

For example, if a customer was contacted in both the January and February instances of the same campaign, and the offer code was returned, it would match two target treatment instances (one from January and one from February). If each offer version expired at the end of the month in which it was issued, a response in February would cause the January treatment instance to be discarded because it had expired. Only the February treatment instance would be credited for this response.

After response tracking rules are applied and all invalid target treatment instances are discarded, Campaign uses different attribution methods to calculate the credit to give to any remaining treatment instances.

## Inferred responses

A response is considered to be inferred when the following conditions are met:

- no Campaign-generated tracking codes (campaign, cell, offer, or treatment code) are returned
- the responder belongs to either a target cell or a control cell
- at least one offer attribute used for response tracking was returned
- all returned offer attributes match.

A response with a null value for an attribute of interest cannot match a treatment that has that offer attribute. For example, a response that is missing a value for "interest rate" cannot match any offer created from an offer template that contains interest rate as an offer attribute.

However, a response with a value for an attribute of interest that does not exist in a treatment does not preclude a match. For example, if a Free Shipping offer was created from an offer template without an "interest rate" offer attribute, and "interest rate" is an attribute of interest, the value of the "interest rate" attribute for an incoming response does not matter when Campaign considers possible matches against treatments associated with the Free Shipping offer.

In addition, the respondent must have been contacted (that is, they must have been in the target cell, or in a group that was contacted), for their response to be counted as inferred.

For example, if a customer was sent a coupon for $1 off laundry detergent and that customer purchased laundry detergent (even if they did not redeem the coupon), Campaign infers a positive response to that target treatment instance.

### Inferred responses from control groups

All responses from members of control groups (which are always hold-out controls in Campaign ) are inferred responses. Matching inferred responses is the only mechanism for crediting responses from holdout control group members.

Since members of a control group did not receive any communication, they cannot have any tracking codes to return.

Response tracking monitors members of control groups to see if they take a desired action without having received any offer. For example, a campaign might target a group of customers who do not have checking accounts with a checking account offer. Members of the control group are tracked to see if they open a checking account within the same time period as the checking account offer.

All incoming events are evaluated to see if they are possible inferred responses for control treatment instances. Any response codes are discarded and remaining attributes of interest are evaluated against control treatment instances for possible response credit.

# Attribution methods

Campaign supports three methods by which responses are credited to offers:

- Best match
- Fractional match
- Multiple match

All three of these response attribution methods are used simultaneously and recorded as part of response history. You can choose to use one, a combination, or all of these in the various performance reports to evaluate your campaign and offer performance.

Response attribution is performed on target treatment instances that remain after invalid responses are discarded (either because the treatment instance did not contact the responder, or because the target instance is expired).

For example, a respondent in a target cell that was given three offers returns a cell code; an exact treatment instance cannot be identified. Best match attribution would choose one of the three offers to receive full credit; fractional match attribution would give each of the three offers 1/3 credit each, and multiple match attribution would give all three offers full credit for the response.

## Best match

With best match attribution, only a single target treatment instance receives full credit for a response; and any other matching treatment instances receive zero credit. When multiple treatment instances match for a response, Campaign chooses the treatment instance with the most recent contact date as the best match. If there are multiple treatment instances with the same contact date and time, Campaign credits one of them arbitrarily.

**Note:** In the case of multiple treatment instances with the same contact date and time, the same instance will be credited each time, but you should not expect Campaign to select a specific treatment instance.

## Fractional match

With fractional match attribution, all $n$ matching treatment instances get $1/n$ credit for the response, so that the sum of all attributed scores sum is 1.

## Multiple match

With multiple match attribution, all $n$ matching treatment instances receive full credit for the response. This can lead to over-crediting of treatments and should be used with caution. Control groups are always tracked using multiple attribution: every response from a member of a control group receives full credit.

# Chapter 10. Stored objects

If there are campaign components that you use frequently, you should try to design and save them as stored objects. Reusing stored objects across flowcharts and across campaigns can result in time savings and more consistency across campaigns.

The types of stored objects in Campaign are:
- Derived fields
- User variables
- Custom macros
- Templates
- Stored Table Catalogs

## About derived fields

Derived fields are variables that do not exist in a data source and are created from one or more existing fields, even across different data sources. In many processes, the configuration window includes a **Derived Fields** button that you can use to create a new variable for querying, segmenting, sorting, calculating, or providing output to a table.

You can make derived fields that you create explicitly available to a subsequent process by enabling the **Make Persistent** option when you create it.

In general, derived fields available to a process are listed in the **Derived Fields** folder. Derived fields are available only for the process in which they were created. If you have not created any derived fields in a process, no **Derived Fields** folder appears in the list.

To use a derived field in another non-subsequent process, store the derived field expression in the **Stored Derived Fields** list. Inclusion in the Stored Derived Fields list makes a derived field available for all processes and all flowcharts.

### Creating derived fields

You create derived fields from the configuration windows for processes that support derived fields.

Only fields from tables that are selected in the process configuration dialog can be used in a derived field expression. If a desired table does not appear, make sure it is selected as a source table.

#### Naming restrictions for derived fields

Derived field names have the following restrictions:
- They cannot be the same as either of the following types of names:
  - A database keyword (such as INSERT, UPDATE, DELETE, or WHERE)
  - A field in a mapped database table
- They cannot use the words Yes or No.

If you do not follow these naming restrictions, database errors and disconnects may result when these derived fields are called.

**Note:** Derived field names also have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215

## To create a derived field

1. From the configuration window of a process that supports derived fields, click **Derived Fields**.

   The Create Derived Field window appears.

2. In the **Field Name** field, enter a name for the new derived field.

   All derived fields previously created in this process appear in the **Field Name** drop-down list. To create a new derived field, enter a different name.

3. Select the **Make Persistent** checkbox if you want to store and pass on the calculated values for this field.

4. Enter an expression for the derived field directly in the **Expressions** text box or click **Formula Helper** to use the **Query Helper**. You can also use the fields listed in the **Fields available for expression** list by selecting a field name and then clicking **<-Use** to insert the field name into the **Expression** text box.

   You can define a derived field to be a null value. Use NULL to return a null value for a snapshot or NULL_STRING to return a null value with a string datatype if you want the derived field to be used with a Campaign macro.

   You can enter a string in a derived field as a constant. If you use a string, it must be surrounded by double quotation marks. For example, "my string". No quotation marks are required for numeric strings.

5. (Optional) Click **Check Syntax** to verify the syntax of the derived field expression you have entered.

   This will display either an error message (if there is a problem) or else indicate Syntax check OK if the syntax is correct.

6. Click **OK** to save the new derived field and return to the process configuration dialog.

## To create a new derived field from an existing one

1. From the configuration window of a process that supports derived fields, click **Derived Fields**.

   The Create Derived Field window appears.

2. From the **Field Name** drop-down list, select the existing derived field from which you want to create a new one.

   The expression for the selected derived field appears in the **Expression** area.

3. Change the name of the existing derived field to the name you want for the new derived field.

   **Important:** You cannot use the words "Yes" or "No" as names for derived fields; doing so results in database disconnects when these derived fields are called.

4. Edit the derived field expression as required.

5. Click **OK** to save the new derived field and return to the process configuration dialog.

## To use a custom macro to create a derived field

1. From a process that supports derived fields, click **Derived Fields**.

   The Create Derived Field window appears.

2. In the Create Derived Field window, click **Formula Helper**.

    A list of custom macros appears in the **Formula Helper**.

3. Select a macro from the list by double-clicking it.

    The macro's declaration and description are displayed, and the macro itself is inserted in the Formula Helper window.

4. Select the appropriate fields from the **Fields available for expression** list to complete your expression.

5. Click **OK** to save the new derived field and return to the process configuration dialog.

# Storing derived fields

Derived fields are available only within the process in which it was created and subsequent processes. For example, if you define a derived field named Pct_Usage with the formula:

(Curr_bal / Credit_limit) * 100

in a process, Pct_Usage will not be available in any other process (except an immediately following process if **Make Persistent** is enabled).

However, you can save the derived field definition in the same way that you would save any other query. You can store the derived field definition in the **Stored Derived Fields** list and give it a name (for example, Pct_of_limit_used). Later, if you want to use the same derived field in another process in the same or a different flowchart, you can select Pct_of_limit_used from the **Stored Derived Fields** list and insert the stored derived expression, rather than reconstructing it from scratch.

## To store a derived field

1. In a process that supports derived fields, create the derived field that you want to store.

2. Click Stored Derived Fields.

    The Stored List window appears.

3. Select the **Save Current Expression to Stored List** option.

4. Click **OK**.

    You see the Saved Derived Field Expression window, where you specify the folder location for storing the selected derived field, a security policy, if applicable, and any notes relating to the derived field.

5. Click **Save**.

    **Note:** If you want to store an already created derived field, select the derived field name from the **Field Name** drop-down list. When the derived field expression appears in the **Expression** area, click **Stored Expressions**.

## To use a stored derived field

1. In a process that supports derived fields click **Derived Fields**, or click **Tools > Stored Derived Fields** to access the Stored Derived Fields Expressions window.

2. From the list of stored derived fields, select the one you want to use.

# To make a derived field persistent

When you make a derived field persistent, you instruct Campaign to store its calculated values and make them available to subsequent processes. This saves time and resources as Campaign does not have to recalculate these values downstream in the flowchart.

1. From the configuration window of a process that supports derived fields, click **Derived Fields**.

   The Create Derived Field window appears.

2. Select the **Make Persistent** checkbox if you want to store and pass on the calculated values for this field.

## Example: Persistent derived field

You might have a Select process configured to choose IDs based on a constraint on a derived field, connected to a Snapshot process to output the selected records that include that derived field. If you mark the derived field to be persistent, the calculated value is passed from the Select process to the Snapshot process.

Another use of persistent derived fields is with any aggregate-type derived field (for example, AVG or GROUPBY). These aggregated fields are calculated based on the multiple rows of data within the current cell, so the value of these aggregated fields changes as the contents of the cell change. With persistent derived fields, you can choose to keep the original calculated value, then carry that to other processes. If you choose to recalculate the derived field instead, you get a calculated value based on the remaining records in the current cell.

When a process takes multiple inputs, such as a Snapshot process working with the input from two Select processes, all persistent derived fields are available to the downstream process.

If a persistent derived field is not available across all incoming Select processes, and it is included in the output for a Snapshot process, then the Snapshot process displays a NULL value for that persistent derived field in all the output rows from the Select processes that did not have that persistent derived field.

If a persistent derived field is not available across all incoming Select processes, and you use it to define a Segment process, then the Segment process has empty segments for the Select processes that did not have that persistent derived field.

The Segment process remains unconfigured if you try to define a segment with an expression using more than one persistent derived field not available across all the Select processes.

The following guidelines apply to persistent derived fields (PDFs):

- PDFs attach to an inbound cell (vector)
- PDFs are calculated before query execution
- Multiple PDFs are available in the following processes:
  - Snapshot: If a PDF is not defined for a cell, its value = NULL. If a single ID is greater than one cell, one row is output for each cell.
  - Segment: PDFs are not available for segmentation by field when multiple input cells are selected. PDFs must exist in all selected input cells for use in a segment by query.

- PDFs keep only a single value (selected at random) per ID value, regardless of the number of times an ID value occurs in the data. Thus, when the output includes no table fields (and includes an IBM Unica ID), there will be only one record per ID value.

  However, when you use a derived field based on a table field, the output includes a table field indirectly. Thus, there will be a record for each instance of an ID value. (In other words, if the ID value occurs seven times in the data, there will be seven records output.)

Persistent derived fields only store a *single* value for each audience ID, which is randomly selected from the available values. This means that when working with unnormalized data, you must use a GROUPBY macro function to achieve the desired behavior.

For example, say you want to find from the purchase transaction table, the highest dollar amount in a single transaction a customer has made and save this as a persistent derived field for downstream processing. You could write a derived field (and then persist it as a persistent derived field) as follows:

```
Highest_purchase_amount = groupby(CID, maxof, Purch_Amt)
```

Against unnormalized purchase transaction data such as the following, this would compute as follows:

| CID | DATE | PURCH_AMT | HIGHEST_PURCHASE_AMOUNT |
|-----|------|-----------|-------------------------|
| A | 1/1/2007 | $200 | $300 |
| A | 3/15/2007 | $100 | $300 |
| A | 4/30/2007 | $300 | $300 |

When the derived field is persisted, it choose (randomly) any value (which are all $300) and persists the value $300 for customer A.

A second less obvious example might be to select a predictive model score from a scoring table for a specific model X. Here the derived field might look like this:

```
ModelX_score = groupby(CID, maxof, if(Model = 'X', 1, 0), Score)
```

And the data might look like:

| CID | MODEL | SCORE | MODELX_SCORE |
|-----|-------|-------|--------------|
| A | A | 57 | 80 |
| A | B | 72 | 80 |
| A | X | 80 | 80 |

Persisting the derived field, ModelX_Score, gives the desired result of the score value of 80. It is incorrect to create a derived field:

```
Bad_ModelX_score = if(Model = 'X', Score, NULL)
```

This would result in the following:

| CID | MODEL | SCORE | BAD_MODELX_SCORE |
|-----|-------|-------|------------------|
| A | A | 57 | NULL |
| A | B | 72 | NULL |

| CID | MODEL | SCORE | BAD_MODELX_SCORE |
|-----|-------|-------|------------------|
| A   | X     | 80    | 80               |

Then when you persist the derived field Bad_ModelX_score, the persisted value could be NULL or 80. If you are working with unnormalized data and the derived field values are not all the same, persisting that derived field could result in *any* of the values being returned. For example, defining Derived_field_Score = SCORE and persisting it could result in the value 57, 72, or 80 for customer A. To ensure desired behavior, you must use the GROUPBY macro over the customer ID and guarantee the derived field value is the *same* for all data for that customer.

# About user variables

Campaign supports user variables, which can be used during process configuration when creating queries and expressions.

## Guidelines for using user variables

The following guidelines apply to user variables:

- User variables are local to the flowchart in which they are defined and used, but have global scope within that flowchart.
- User variables use the following syntax: UserVar.UserVarName
- User variables have **Initial Values**, which is the value assigned when a user variable is initially defined in the **User Variables** dialog. The **Initial Value** is only used to set the **Current Value** before executing a flowchart run. It is the **Current Value** that Campaign uses during a flowchart run.

  **Note:** If the **Current Value** for a user variable is not set and you execute a process run or a branch run, Campaign will not be able to resolve the user variable. Campaign only sets the **Current Value** of a user variable to the **Initial Value** before a flowchart run.

- You can change the **Current Value** of a user variable in the Derived Field window of a Select process.
- User variables can be set to constants or to expressions, such as UserVar.myVar = Avg(UserTable.Age).

  **Note:** If you use an expression that returns multiple values (such as UserTable.Age+3, which will return one value for each record in the table), the user variable is set to the first value returned.

- When using user variables within SQL statements, do not enclose user variables in quotation marks, either single or double.
- If you pass object names to your database (for example, if you use a user variable that contains a flowchart name), you must ensure that the object name contains only characters supported by your particular database. Otherwise, you will receive a database error.
- The values of user variables can be passed in on process execution.
- User variables are supported in outbound triggers.
- User variables are supported for use in custom macros.

## To create a user variable

1. From a flowchart in **Edit** mode, click the **Options** icon and select **User Variables**.

   The User Variables dialog appears.

2. In the **Variable Name** column, enter a name for the new user variable by clicking the **<Click here to add new item>** hotspot.

3. In the **Data Type** column, select a data type from the drop-down list. If you do not select a data type, the application selects **None** when you click **OK**.

   The **None** data type may produce unpredictable results; to avoid this, specify the correct data type.

4. In the **Initial Value** column, enter an initial (starting) value for the user variable. You can also profile fields for available values by clicking the ellipsis button that becomes available when you click inside the column.

5. In the **Current Value** column, enter a current value for the user variable. You can also profile fields for available values by clicking the ellipsis button that becomes available when you click inside the column.

6. Repeat these steps for each user variable that you want to create.

7. When you complete defining user variables, click **OK**.

   The application stores the new user variables. You can access them later when configuring processes.

After a flowchart run executes, the **Current Value** of each user variable is displayed in the **Current Value** section for each user variable. If the current value is different from the initial value, you can restore the initial value by clicking **Restore Defaults**.

**Note:** If the **Current Value** of a user variable is redefined in a Select process, resetting the **Current Value** to the **Initial Value** manually will have no effect on the value of the user variable during a flowchart, branch, or process run.

## About custom macros

A custom macro is a query that you create using either a IBM Unica Expression, raw SQL, or raw SQL that includes a value. Custom macros also support variables, which makes them far more powerful than the stored queries they are designed to replace.

You can save a custom macro and use it in configuring processes in a flowchart, and in defining derived fields.

Support for raw SQL improves performance, allowing complex transactions to be carried out in the database rather than having the raw data filtered and manipulated in the application server.

Campaign supports the following three types of custom macros, which in turn support an unlimited number of variables:

- Custom macros that use a IBM Unica Expression
- Custom macros that use raw SQL
- Custom macros that use raw SQL and include a specified value

**Important:** Since non-technical users are able to use custom macros, when you create a custom macro you should describe how it works very carefully, place

similar kinds of macros in special folders, and so on, to reduce the possibility that someone might use a custom macro incorrectly and retrieve data that they were not expecting.

## To create a custom macro

1. On a flowchart page in **Edit** mode, click the **Options** icon and select **Custom Macros**.

   The Custom Macros dialog appears, displaying existing custom macros.

2. Click **New Item**.

3. From the **Save Under** drop-down list, select the folder location to which you want to save the custom macro.

4. In the **Name** field, enter a name and declaration for the custom macro so that it can be referenced, using the following syntax:

   MacroName(var1,var2,...)

   Only the name of the custom macro (which must be unique) and the list of variables need to be expressed.

   The *MacroName* must be alphanumeric. You cannot use spaces in the MacroName string, but you can use underscores (_).

   **Note:** If a custom macro has the same name as a built-in macro, the custom macro will take precedence. As a best practice, to avoid confusion, do not name custom macros with operator names or names that are the same as those of built-in macros in Campaign. The exception would be if you specifically want the new custom macro to always be used, and the built-in macro to be inaccessible.

   **Important:** The variable names must match the variable names in the custom macro definition in the Expression window, and they must be expressed as a comma-separated list within parenthesis.

5. From the **Security Policy** drop-down list, select a security policy for the new custom macro.

6. Optionally, use the **Note** field to enter any notes for the new custom macro, providing a clear explanation of what the custom macro is designed to do and what each variable represents.

7. From the **Expression Type** drop-down list, select the type of custom macro you are creating.

   • If you select **Raw SQL Selecting ID List,** you must also select a database from the drop-down list in the **Database** field.

   • If you select **Raw SQL Selecting ID + Value**, you must also select a database from the drop-down list in the **Database** field and select the value type of the field from the **Value Type** drop-down list. Ensure that the value type you select here is correct. Otherwise, when you later attempt to profile this query, you will get a "Mismatched Type" error.

   • If you selected **Text** as the value type, specify the width of the value type in bytes in the **Width (# Bytes)** field. You must obtain this width in bytes information from the database. If you do not have access to the database or are unable to obtain the information, enter 256, the maximum width.

8. Click inside the **Expression** field to open the Specify Selection Criteria window.

9. Create your query expression. You can use as many variables as you like. Variable syntax is alphanumeric, and the variable must be enclosed in open and closed angle brackets (<>). Operands (values and strings) and operators might be variables.

**Important:** Do not use flowchart user variables in custom macro definitions, since custom macros are global and flowchart user variables are not.

**Example: Custom macro that uses raw SQL selecting an ID and a value**



10. Click **Save** to save the custom macro.

The custom macro is then stored, and can be accessed by its name.

11. Click **Close** to exit the Custom Macros dialog.

## Guidelines for using custom macros

Keep the following guidelines in mind when creating or using a custom macro:

* The name of a custom macro must be alphanumeric. You cannot use spaces in the name string, but you can use underscores (_).
* If a data source has been configured with the property ENABLE_SELECT_SORT_BY = TRUE, then you *must* write raw SQL custom macros with an **ORDER BY** clause in order to sort the returned records by the audience key fields of the audience level under which you are working. Otherwise, if the sort order is not as expected, an error will be generated when the custom macro is used in a derived field in a Snapshot process.
* If you do not compare a returned value from a custom macro, if the value is numeric, non-zero values are treated as TRUE (and therefore IDs associated with them are selected) and zero values are treated as FALSE. String values are always treated as FALSE.
* When creating a custom macro that uses raw SQL, using a temp table can greatly speed up the performance of the raw SQL by scoping the amount of data it needs to work with.

When a custom macro uses temp tables in its underlying logic, a temp table will be forced up to the database so that the logic does not fail.

However, if a custom macro is used in a top level SELECT, then there is no history for Campaign to use to force a temp table up to the database, and the logic fails.

Thus, when creating a custom macro that uses raw SQL, you might need to create two versions of the same custom macro – one that uses temp table tokens and one that does not.

The custom macro without temp table tokens can be used at the top of a tree (for example, in the first SELECT). The one with temp table tokens can be used anywhere else in the tree when there might be a temp table to take advantage of.

- Self-joins might occur when combining values returned from custom macros when querying against unnormalized data, which is not likely to be the desired behavior.

  For example, if you a use a custom macro based on raw SQL that returns a value and (in a Snapshot process, for example) you output the custom macro and another field from the table that the custom macro is based on, Campaign performs a self join on that table. If the table is non-normalized, you will end up with a Cartesian product (that is, the number of records displayed is more than you would expect).

- Custom macros are now automatically by reference, because the definition of the custom macro is not copied into the current process.

  At execution time, a custom macro is resolved by looking up its definition in the **UA_CustomMacros** system table (where definitions are stored) and then used/executed.

- Unlike stored queries, custom macro names must be unique, independent of the folder path. In releases prior to 5.0, you could have a stored query named A, for example, in both folder F1 and F2.

  Campaign supports stored queries from earlier releases. However, references to non-unique stored queries must use the old syntax:

  storedquery(<query name>)

- When resolving user variables in custom macros, Campaign uses the current value of the user variable when checking syntax. If the current value is left blank, Campaign generates an error.

- The temp table token is provided as a performance optimization advanced feature that scopes the amount of data pulled down from the database by the set of audience IDs in the temp table available for use by the current process. This temp table list of IDs might be a superset of the IDs in the current cell. Therefore, aggregate functions performed over the temp table (for example, average or sum) are not supported and might generate incorrect results.

- If you intend to use the custom macro across several different databases, you might want to use a IBM Unica expression rather than raw SQL, since raw SQL can be specific to a particular database.

- If a custom macro contains raw SQL and another custom macro, the custom macro is resolved, executed and its value returned before the raw SQL is executed.

- Campaign treats a comma as a parameter separator. If you are using commas as literal characters in a parameter, enclose the text in open and close brackets ({}), as in the following example:

  TestCM( {STRING_CONCAT(UserVar.Test1, UserVar.Test2) } )

- Campaign supports simple substitution for parameters in custom macros using raw SQL code. For example, if you set up a Select process box on a flowchart containing this query:

```
exec dbms_stats.gather_table_stats(tabname=> <temptable>,ownname=>
'autodcc')
```

  Campaign would successfully substitute the actual temp table in place of the <temptable> token. Note that the single quotes around the table name are required.

The following tables show how Campaign treats custom macros in queries and derived fields.

**Custom macros in queries and derived fields (Select, Segment, and Audience Processes)**

| Type of custom macro | How it is used |
|---|---|
| Raw SQL: IDs | Runs as a separate query. The ID list is merged with other results.<br><br>If a custom macro contains other custom macros plus raw SQL, the custom macros are resolved and executed and then the raw SQL is executed. |
| Raw SQL: IDs + Value | Expects that the returned value will be used in an expression or as a comparison.<br><br>If the value is not used this way, Campaign treats a non-zero value as TRUE for ID selection and a zero value and string as FALSE. |
| IBM Unica Expression | The expression is resolved and a syntax check is performed. One query per table is supported, and the IDs are match/merged. |

**In a Raw SQL Query (Select, Segment, and Audience Processes)**

| Type of custom macro | How it is used |
|---|---|
| Raw SQL: IDs | Custom macro is resolved and then the query is executed. |
| Raw SQL: IDs + Value | Not supported. |
| IBM Unica Expression | The expression is resolved, but no syntax check is performed. If the expression is incorrect, it is detected by the database server when executed. |

## To manage a custom macro

You can create a folder structure to organize your custom macros. You can then move custom macros from one folder to another within this structure.

1. On a flowchart page in **Edit** mode, click the **Options** icon and select **Custom Macros**.

   The Custom Macros dialog appears.

2. Navigate through the **Items List** to select the macro you want to edit.

   The **Info** area shows the detailed information for the selected macro.

3. Click **Edit/Move** to edit or move the selected macro.

   The Edit/Move Custom Macros dialog opens.

4. You can change the name of the macro, edit the note, change the folder/location where the macro is stored, or click **Edit** to edit the expression.

5. Click **Save** to save your changes.

6. Click **Close** to exit the Custom Macros dialog.

# About templates

A template is a group of selected and saved processes from flowcharts. Templates allow you to design and configure one or more processes only once, and save them in the Template Library. Templates save process configurations and table mappings, and are available for any session or campaign.

## To copy a template to the Template Library

You can add templates to the template library by copying them there.

1. In a flowchart in **Edit** mode, select the process(es) you want to save as a template. Use **Shift+Click** and **Ctrl+Click** to select multiple processes.

2. Right-click on the process(es) you want to copy and select **Copy to Template Library**.

   The Save Template window appears.

3. Enter the name of the template in the **Name** field.

   You cannot use spaces in the name string. Stored templates are identified by names, which must be unique in the folder in which it is stored.

4. (Optional) Enter a free-form text description in the **Note** field.

5. (Optional) Select a folder where the template will be located. Select an existing folder from the list, or select **New Folder** to create a new one. The currently selected folder is shown after the **Save Under** field above the **Item List**. To create a new folder, click **New Folder**. You can create an unlimited number of folders (including nesting folders in a hierarchy) to organize and store your templates.

6. Click **Save**.

## To paste a template from the Template Library

You can paste a template from the Template Library into a flowchart you are building.

1. On a flowchart page in Edit mode, click the **Options** icon and select **Stored Templates**.

   The Stored Templates dialog appears.

2. Select a template from the **Items** list.

3. Click **Paste Template**.

The selected template is pasted onto the flowchart workspace.

**Note:** The inserted processes might appear on top of other process already in the flowchart. All inserted processes are initially selected to make them easy to move as a group.

Templates can be accessed by any other session or campaign through the Template Library. If a template is pasted into a flowchart that has different table mappings, the subsequent mapping is augmented but not replaced by the new mapping, unless the table name(s) are the same.

## To manage a template

You can create new folders, edit, move, and remove stored templates through this command.

1. On a flowchart page in Edit mode, click the **Options** icon and select **Stored Templates**.

   The Stored Templates dialog appears.

2. From the **Items List**, select the template that you want to edit or move.

3. Click **Edit/Move**.

   The Edit/Move Stored Templates dialog opens.

4. In the **Save Under** field, specify the folder/location to which you want to move the template.

5. You can also change the name of the stored template, or edit the note associated with it.

6. Click **Save** to save your changes.

7. Click **Close** to exit the Stored Templates window.

# About stored table catalogs

A table catalog is a collection of mapped user tables. Table catalogs store all the user table mapping meta data information for re-use across flowcharts. Table catalogs are stored by default in a proprietary binary format using a `.cat` extension.

For information on creating and working with table catalogs, see the *Campaign Administrator's Guide*

## To access stored table catalogs

From a flowchart in page in **Edit** mode, click the **Options** icon and select **Stored Table Catalogs**.

The Stored Table Catalog dialog appears.

**Note:** If you have administrator permissions, you can also access stored catalogs from the Campaign Settings page. For more information, see the *Campaign Administrator's Guide*.

## To edit a table catalog

1. On a flowchart page in **Edit** mode, click the **Options** icon and select **Stored Table Catalogs**.

   The Stored Table Catalogs dialog appears.

2. Select the desired table catalog in the **Items List**.

   The **Info** area shows the detailed information for the selected table catalog, including the table catalog name and file path.

3. Click **Edit/Move**.

4. You can change the name of the stored table catalog, edit the table catalog description, or change the folder/location where the table catalog is stored.

5. Click **Save**.

6. On the Stored Table Catalogs window, click **Close**.

## To remove a table catalog

**Important:** You should remove table catalogs only using the Campaign interface. If you remove tables or otherwise change table catalogs directly in the file system, Campaign cannot guarantee data integrity in your system.

1. On a flowchart page in **Edit** mode, click the **Options** icon and select **Stored Table Catalogs**.

   The Stored Table Catalogs window appears.

2. Select the desired table catalog in the **Items List**.

   The **Info** area shows the detailed information for the selected table catalog, including the table catalog name and file path.

3. Click **Remove**.

   You see a confirmation message asking you to confirm removal of the selected table catalog.

4. Click **OK**.

5. On the Stored Table Catalogs window, click **Close**.

# Chapter 11. Sessions

Like campaigns, sessions are comprised of individual flowcharts. However, sessions allow you to create persistent data constructs (such as strategic segments, stored dimension hierarchies, and cubes) that are available globally to all campaigns. You can use sessions to create flowcharts that:

- Transform data required across campaigns;
- Produce PredictiveInsight input files;
- Contain strategic segments.

**Note:** When you are designing flowcharts, be careful not to create cyclical dependencies among your processes. For example, your flowchart has a Select process that provides input to a CreateSeg process. If you choose as input in your Select process a segment that will be created by the same CreateSeg process that the Select process provides output to, you will have created a cyclical dependency. This situation will result in an error when you try to run the process.

## Working with sessions

You can perform the following tasks with sessions:

- "To create a session"
- "About organizing sessions" on page 184
- "To view a session" on page 182
- "To edit a session's Summary details" on page 182
- "To edit a session flowchart" on page 182
- "About copying sessions" on page 183
- "About running sessions" on page 183
- "To move a session" on page 183
- "To delete a session" on page 183

**Note:** Working with sessions requires the appropriate permissions. For information on permissions, see the *Campaign Administrator's Guide*.

### To create a session

1. Select `Campaign > Sessions`.

   The All Sessions page displays the folder structure used to organize your company's sessions. If you have previously opened a subfolder within the All Sessions page, that subfolder will be displayed instead.

2. Navigate through the folder structure until you are displaying the contents of the folder where you want to add your session.

3. Click the **Add a Session** icon.

   The New Session page appears.

4. Enter a name, security policy and description for the session.

   **Note:** Session names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

5. Click **Save Changes**.

**Note:** You can also click **Save and Add Flowchart** to immediately start creating your session's flowcharts.

## To view a session

1. Select **Campaign > Sessions**.
   The All Sessions page appears.
2. Click the name of the session you want to view, to open the session's **Summary** tab.
   OR
3. Click the **View a tab** icon next to the name of the session you want to view.
   The **Summary** and the names of any flowcharts in the session appear in a context-menu.
4. Select the session tab you want to view.
   The session opens to the tab you selected.

## To edit a session's Summary details

1. Select **Campaign > Sessions**.
   The All Sessions page appears.
2. Click the name of the session whose summary details you want to edit.
   The session opens to its **Summary** tab.
3. Click the **Edit Summary** icon.
4. Make your desired edits on the **Summary** tab.

   **Note:** Session names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
5. When you have finished making your changes, click **Save Changes**.
   Your changes are saved and the session closes.

## To edit a session flowchart

1. Select **Campaign > Sessions**.
   The All Sessions page appears.
2. Click the **Edit a tab** icon next to the name of the session whose flowchart(s) you want to edit.
3. From the context-menu, click the name of the flowchart you want to edit.
   The flowchart page appears in **Read Only** mode.
4. Click the **Edit** icon to open the flowchart in **Edit** mode.
5. Make the desired changes to the flowchart.
6. When you have finished making your changes, click **Save** or **Save and Exit**.

## To edit a session flowchart's properties

1. Open the flowchart for editing.
2. Click **Properties** in the Flowchart toolbar.
   The Edit Flowchart Properties page appears.
3. Modify the flowchart name or description.

   **Note:** Flowchart names have specific character restrictions. See "Special characters in IBM Unica Campaign object names," on page 215.

4. Click **Save Changes**.

The modified flowchart details are saved.

## About copying sessions

You do not copy sessions, but rather the flowcharts within sessions.

## About running sessions

To run a session, you need to run each of its flowcharts.

## To move a session

You can move sessions from folder to folder for organizational purposes.

**Note:** If someone is editing a flowchart in the session you plan to move, that entire flowchart might be lost when you move the session. You must make sure that none of the flowcharts in the session are open for editing when you move the session.

1. Select **Campaign > Sessions**.

The All Sessions page appears.
2. Open the folder that contains the session you want to move.
3. Select the checkbox next to the session you want to move. You can select multiple sessions to move to the same location at one time.
4. Click the **Move** icon.

The Move Items To window appears.
5. Click the folder where you want to move the session.

Navigate through the list by clicking the **+** sign next to a folder to open it.
6. Click **Accept this Location**.

**Note:** You can also double-click a folder to select and accept the location in one step.

The session is moved into the destination folder.

## About deleting sessions

When you delete a session, the session and all flowchart files are deleted. If there are portions of your session you want to store for reuse, you can save them as a stored object. For more information, see "About derived fields" on page 167.

**Important:** If you delete a session that has associated contact or response history records, all corresponding contact and response history records will be deleted. Do not delete the session if you need to retain the associated contact and response history.

### To delete a session

1. Select **Campaign > Sessions**.

The All Sessions page appears.
2. Open the folder that contains the session you want to delete.

Navigate through the folder structure by clicking a folder name to open it, clicking **All Sessions** to return to the All Sessions page, or clicking **Parent Folder** to open the folder that contains the currently open folder.

3. Select the checkbox next to the session you want to delete. You can select multiple sessions to delete at one time.

4. Click the **Delete Selected** icon.

   **Note:** If you attempt to delete a session that has associated contact or response history records, a warning message indicates that all corresponding contact and response history records will be deleted. If you need to retain the corresponding contact and response history, click **Cancel**.

5. Click **OK** on the confirmation window.

   The session is deleted.

## About organizing sessions

You can organize your sessions by creating a folder or series of folders. You can then move sessions from one folder to another within the folder structure you have created.

You can add, move, and delete folders to organize your sessions. You can also edit a folder's name and description.

### To add a session folder

1. Select **Campaign > Sessions**.

   The All Sessions page appears.

2. Click the folder where you want to add a subfolder and click **Add a Subfolder**, or simply click Add a Subfolder to add a folder at the top level.

   The Add a Subfolder page appears.

3. Enter a name, the security policy, and description for the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

4. Click **Save Changes**.

You are returned to the All Sessions page. The new folder or subfolder you created is displayed.

### To edit a session folder's name and description

1. Select **Campaign > Sessions**.

   The All Sessions page appears.

2. Click the folder you want to rename.

3. Click the **Rename** icon.

   The Rename a Subfolder page appears.

4. Edit the name and description of the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.

5. Click **Save Changes**.

   You are returned to the All Sessions page. The folder or subfolder is renamed.

## To move a session folder

**Important:** If someone is editing a flowchart in the session you plan to move, flowchart results or the entire flowchart might be lost when you move the session. Please be sure that none of the flowcharts in the session are open for editing when you move the session.

1. Select **Campaign > Sessions**.

   The All Sessions page appears.
2. Click the folder containing the subfolder you want to move.
3. Select the checkbox next to the folder you want to move. You can select multiple folders to move to the same location at one time.
4. Click the **Move** icon.

   The Move Items To window appears.
5. Click the folder where you want to move the subfolder.

   Navigate through the list by clicking the **+** sign next to a folder to open it.
6. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

The subfolder and all its contents are moved into the destination folder.

## To delete a session folder

You must move or delete the contents of a folder before you can delete it.

**Note:** If you have the permissions required to delete a folder, Campaign also allows you to delete any of the subfolders in that folder.

1. Select **Campaign > Sessions**.

   The All Sessions page appears.
2. Open the folder that contains the subfolder you want to delete.
3. Select the checkbox next to the folder you want to delete. You can select multiple folders to delete at one time.
4. Click the **Delete Selected** icon.
5. Click **OK** on the confirmation window.

   The folder and all its empty subfolders are deleted.

## All Sessions page icons

The All Sessions page uses the following icons.



The icons, left to right, are described in the following table.

**Note:** Many of the icons in the Campaign interface are associated with features that require permissions. For more information, see the *Marketing Platform*

*Administrator's Guide*. The following **Add a Session** and **Add a Subfolder** icons do not appear without the appropriate permissions.

| Icon Name | Description |
|---|---|
| Add a Session | Click to add a new session. |
| Add a Subfolder | Click to add a new session subfolder. |
| Print this Item | Select one or more sessions by clicking the checkbox next to each session, then click this icon to print the selected sessions. |
| Move | Select one or more sessions by clicking the checkbox next to each session, then click this icon to specify a location to move the selected sessions. |
| Delete Selected | Select one or more sessions by clicking the checkbox next to each item, then click this icon to delete the selected sessions. |

# About strategic segments

A strategic segment is a globally persistent list of IDs. Strategic segments are simply segments that are created, typically by Campaign administrators, using the Create Seg process in a session flowchart, so that they are available for use globally, in all campaigns.

Campaign supports multiple strategic segments; the ID list that is created for each strategic segment and audience level is stored in the Campaign system tables. You can associate an unlimited number of strategic segments with a campaign.

Strategic segments are often used in cubes. A cube can be created from any list of IDs, but it is more powerful if it is based on a strategic segment, since cubes based on strategic segments are global and can be analyzed by the various segment reports.

Strategic segments can be used as global suppression segments. A global suppression segment defines the list of IDs that are automatically excluded from cells in flowcharts for a particular audience level.

Strategic segments can optionally specify one or more IBM Unica data sources in which that strategic segment will be cached (that is, stored in the database so that uploading the strategic segment IDs is not required for each flowchart using the strategic segment). This can provide significant performance improvements in using strategic segments.

Cached strategic segments are stored in temp tables, which are assigned the `TempTablePrefix` configuration parameter.

**Note:** Working with stratetic segments requires the appropriate permissions. For information on permissions, see the *Campaign Administrator's Guide*.

## Improving performance of strategic segments

By default, the Create Seg process creates a segment bin file on the application server, which can take a long time to complete for a large strategic segment. When Campaign updates the binary file, it drops and then inserts the rows again into a cached table; the entire file is rewritten for sorting. For extremely large strategic

segments (for example, 400 million IDs), it takes a long time to rewrite the entire file, even when the vast majority of the IDs have not changed.

To improve performance, you can use the doNotCreateServerBinFile property on the Configuration page to specify that strategic segments create a temp table in the data source instead of a bin file on the application server. When this property is set to TRUE, at least one data source must be specified in the Create Seg process configuration.

In addition, performance optimizations such as creating indices and generating statistics, which cannot be applied to cached segment tables, can be used with segment temp tables. The PostSegmentTableCreateRunScript, SegmentTablePostExecutionSQL, and SuffixOnSegmentTableCreation properties on the Configuration page support these performance optimizations.

For details about properties on the Configuration page, see the *Campaign Administrator's Guide*.

## Prerequisites for creating strategic segments

Before you create a strategic segment, you should do the following:
- Determine how your strategic segments will be organized, the folder hierarchy and naming conventions you will use.
- Determine exactly what strategic segments are important to you.
- Determine the logic behind your strategic segments.
- Identify the relationship between different strategic segments.
- Identify the audience levels appropriate to your strategic segments.
- Determine how often the strategic segments should be refreshed.
- Determine what level of detail is defined in each strategic segment. For example, should a segment include all suppressions?
- Determine if you want to keep historical strategic segments in an archive folder.
- Consider the size of the strategic segments you want to create and their potential impact on performance. See "Improving performance of strategic segments" on page 186.

## To create a strategic segment

**Note:** Working with strategic segments requires the appropriate permissions. For information on permissions, see the *Campaign Administrator's Guide*.

Strategic segments are created and made available for selection only when the Create Seg process has run successfully in production mode. Configuring the Create Seg process is not sufficient. Running the process in test mode does not create a strategic segment or update an existing one.

1. Create a session, or open an existing session for editing.

   **Note:** Segment names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
2. Build a flowchart whose final output process is the CreateSeg process.
3. Click **Save and Return** when you have finished creating your flowchart.
   The flowchart is saved. The strategic segments are listed on the All Segments page and are available for use in all campaigns.

**Example: Session flowchart creating strategic segments**

In a flowchart in the Sessions area of Campaign, add two Select processes, one to select all records from a particular field in a mapped table in your datamart, and the other to select all records from the same datamart that have been classified as opt-outs and thus need to be removed from the total list of IDs.

Next, use a Merge process whose input consists of the output cells of the two Select processes to eliminate the OptOut IDs and produce an output cell of eligible IDs.

Then, add a Segment process to which the eligible IDs from the Merge process are passed, where they are divided into three discrete groups of IDs.

Finally, add a Create Seg process to output the three segments as a globally persistent list of audience IDs.

Run the flowchart in production mode to create the strategic segment and make it available for use in multiple campaigns.

## To view a segment from the All Segments page

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Click the name of the session you want to view.

The Summary page displays the segment's summary information.

*Table 17. Summary information for segments*

| Element | Description |
| --- | --- |
| Description | The description of the segment provided in the Create Seg process |
| Source Flowchart | The name of the flowchart where the segment was defined |
| Audience Level | The audience level for the segment |
| Current Count | The number of IDs in this segment and the date that this segment was last run |
| Used in the Following Campaign(s) | A list of all the campaigns that use the segment, with links to those campaigns |

## To view a strategic segment from the Campaign summary page

1. Go to the summary page of any campaign that uses the segment you want to view.
2. In the **Relevant Segments** list, click the name of the segment.

   The segment's summary page appears.

## To edit a segment's Summary details

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Click the name of the segment whose summary details you want to edit.

   The segment opens to its **Summary** tab.

3. Make your desired edits to the name or description of the segment.

   **Note:** Segment names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
4. When you have finished making your changes, click **Save Changes**.

   Your changes are saved and the segment closes.

## To edit a strategic segment's source flowchart

1. Select **Camaign > Segments**.

   The All Segments page appears.
2. Click the name of the segment whose flowchart you want to edit.

   The segment's Summary page appears.
3. Under **Source Flowchart**, click the link to the flowchart.

   The flowchart page opens in **Read Only** mode.
4. Click **Edit** to open the flowchart in **Edit** mode.
5. Make the desired changes to the flowchart.
6. When you have finished making your changes, click **Save** or **Save and Exit**.

**Important:** The existing strategic segment is not updated until you re-run the updated flowchart in production mode.

## All Segments page icons

The All Segments page uses the following icons



The icons, left to right, are described in the following table.

*Table 18. Icons on the All Segments page*

| Icon Name | Description |
| --- | --- |
| Add a Subfolder | Click to add a new segment subfolder. |
| Advanced Search | Click to open the Advanced Search Options dialog, where you can specify attributes and values to search for offers. |
| Print | Select one or more segments by clicking the checkbox next to each segment, then click this icon to print the selected segments. |
| Move | Select one or more segments by clicking the checkbox next to each segment, then click this icon to specify a new location for the selected segments. |
| Delete Selected | Select one or more segments by clicking the checkbox next to each segment, then click this icon to delete the selected segments. |

## Running strategic segments

You should re-generate strategic segments if the contents of your datamart have changed. To re-generate a strategic segment, you run the flowchart in which that

segment was created, in production mode. The Enable Output setting in Test Run mode has no effect; strategic segments are output only in production mode.

**Note:** When a Create Seg process is re-run in production mode, the existing strategic segment created by that process is deleted. This means that any users of the existing strategic segment (including global suppressions) might see an "invalid segment" error if the new Create Seg process run fails to complete successfully, or while it is still running.

# Organizing strategic segments

You can organize your strategic segments by creating a folder or series of folders. You can then move strategic segments from one folder to another within the folder structure you have created.

**Note:** The folder in which a strategic segment resides specifies the security policy applying to the strategic segment, determining who can access, edit, or delete it.

## To add a segment folder

You can add, move, and delete folders to organize your segments. You can also edit a folder's name and description.

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Click the folder where you want to add the subfolder.
3. Click the **Add a Subfolder** icon.

   The Add a Subfolder page appears.
4. Enter a name, the security policy, and description for the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
5. Click **Save Changes**.

   You are returned to the All Segments page. The new folder or subfolder you created is displayed.

## To edit a segment folder's name and description

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Click the folder you want to rename.
3. Click **Rename**.

   The Rename a Subfolder page appears.
4. Edit the name and description of the folder.

   **Note:** Folder names have specific character restrictions. For details, see "Special characters in IBM Unica Campaign object names," on page 215.
5. Click **Save Changes**.

   You are returned to the All Segments page. The folder or subfolder is renamed.

## To move a segment folder

**Important:** If someone is editing the source flowchart for any segment you plan to move, that entire flowchart might be lost when you move the segment. Make sure none of the source flowcharts are open for editing when you move the subfolder.

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Open the folder that contains the subfolder you want to move.

   Navigate through the folder structure by clicking a folder name to open it, clicking **All Segments** to return to the All Segments page, or clicking a folder name to open folders in the tree.
3. Select the checkbox next to the folder you want to move. You can select multiple folders to move to the same location at one time.
4. Click the **Move** icon.

   The Move Items To window appears.
5. Click the folder where you want to move the subfolder.

   Navigate through the list by clicking the **+** sign next to a folder to open it.
6. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

   The subfolder and all its contents are moved into the destination folder.

## To delete a segment folder

You must move or delete the contents of a folder before you can delete it.

**Note:** If you have the permissions required to delete a folder, Campaign also allows you to delete any of the subfolders in that folder.

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Open the folder that contains the subfolder you want to delete.

   Navigate through the folder structure by clicking a folder name to open it, clicking **All Segments** to return to the All Segments page, or clicking a folder name to open folders in the tree.
3. Select the checkbox next to the folder you want to delete. You can select multiple folders to delete at one time.
4. Click the **Delete Selected** icon.
5. Click **OK** on the confirmation window.

   The folder and all its empty subfolders are deleted.

## To move a segment

You can move strategic segments from folder to folder for organizational purposes.

**Important:** If a source flowchart for the segment you plan to move is open for editing, the entire flowchart may be lost when you move the segment. Make sure that none of the source flowcharts are open for editing before you move the subfolder.

1. Select **Campaign > Segments**.

   The All Segments page appears.
2. Open the folder that contains the segment you want to move.
3. Click the checkbox next to the segment you want to move. You can select multiple segments to move to the same location at one time.
4. Click the **Move** icon.

The Move Items To window appears.

5. Click the folder where you want to move the segment.

   Navigate through the list by clicking the **+** sign next to a folder to open it.

6. Click **Accept this Location**.

   **Note:** You can also double-click a folder to select and accept the location in one step.

   The segment is moved into the destination folder.

## Deleting strategic segments

Strategic segments can be deleted in the following ways:

- By deleting the strategic segment itself from its folder location on the All Segments page. Strategic segments that you delete by this method will be re-created if the Create Seg processes that generated them originally are re-run in production mode. For details, see "Deleting strategic segments" on page 240.
- By deleting the Create Seg process that created the strategic segment. The strategic segment is deleted only when the flowchart is saved. Strategic segments deleted in this way cannot be recovered. For details about deleting processes in flowcharts, see "Deleting processes" on page 65.
- By deleting the flowchart containing the Create Seg process that created the strategic segment. Strategic segments deleted in this way cannot be recovered. For details about deleting flowcharts, see "About deleting flowcharts" on page 56.

### To delete a segment

Use the following procedure to delete a strategic segment directly from the All Segments page.

**Note:** Strategic segments that you delete by this method will be re-created if the Create Seg processes that generated them originally are re-run in production mode.

1. Select **Campaign > Segments**.

   The All Segments page appears.

2. Open the folder that contains the segment you want to delete.

3. Select the checkbox next to the segment you want to delete. You can select multiple segments to delete at one time.

4. Click the **Delete Selected** icon.

5. Click **OK** on the confirmation window.

   The segment is deleted.

   **Note:** If there are still active flowcharts that contain the segment, the segment can be re-created when those flowcharts are run. If a flowchart containing the segment was open for editing when you deleted the segment, it will also be re-created.

## About global suppressions and global suppression segments

Use the global suppression feature to specify a list of IDs (in a single audience level) that are automatically excluded from all cells in flowcharts in Campaign.

You do this by creating this list of unique IDs as a strategic segment, then by specifying that segment as a global suppression segment for a particular audience level. Only one global suppression segment can be configured for each audience level.

**Note:** Specifying and managing global suppression segments requires the appropriate permissions and is usually performed by your Campaign administrator. For details, see the *IBM Unica Campaign Administrator's Guide*.

## Applying global suppressions

If a global suppression segment has been defined for an audience level, all top-level Select, Extract, or Audience processes associated with that audience level automatically exclude the IDs in the global suppression segment from their output cells (unless the global suppression is explicitly disabled for a specific flowchart). By default, flowcharts have global suppression enabled so that no action needs to be taken for any configured global suppression to be applied.

An exception to the default of global suppression being enabled is the flowchart containing the CreateSeg process that created the global strategic segment itself. In this case, the global suppression is always disabled (only for the audience level for which the global suppression segment is being created).

**Note:** Also note that performing Test Query in Select, Extract or Audience processes does not take into account any global suppressions.

### Switching audiences with global suppressions

If you are switching from Audience 1 to Audience 2 in a flowchart, and have one global suppression defined for each of these audience levels, the global suppression segment for Audience 1 is applied to the input table, and the global suppression segment for Audience 2 is applied to the output table.

## Disabling global suppressions

You can disable global suppressions for individual flowcharts only if you have the appropriate permissions. If you do not have the appropriate permissions, you cannot change the setting and must run the flowchart with the existing setting.

An administrator might grant global suppression override permissions to specific users so that they can design and execute special campaigns that are allowed to contact normally suppressed IDs, for example, IDs in a universal holdout group.

### To disable global suppressions for a flowchart
1. Open the flowchart for editing.
2. Click the **Admin** icon and select **Advanced Settings**.
3. In the Advanced Settings window, check the **Disable Global Suppressions for this Flowchart** checkbox.
4. Click **OK**.

## About dimension hierarchies

A dimension hierarchy is a set of SQL selection queries that can be applied to any list of IDs. Like strategic segments, dimension hierarchies can be made available globally in a Select process or used as the basis for constructing cubes.

Among the most commonly specified dimensions are time, geography, product, department, and distribution channel. However, you can create any kind of dimension that best relates to your business or campaign.

As the building blocks of cubes, dimensions become the basis for a variety of reports (total sales across all products at increasing aggregation levels, cross-tabular analysis of expenses versus sales by geography, and so on). Dimensions are not limited to a single cube; they can be used in many cubes.

A dimension hierarchy is made up of various *levels*, which in turn are comprised of *dimension elements*, or *elements* for short.

Campaign supports dimensions that are comprised of an infinite number of levels and elements, as well as:

- Data points built as input to customer analytic reporting and visual selection
- Roll ups into unlimited number of categories to support drill-down capability. (Dimensions must roll up cleanly across boundaries, so elements must be mutually exclusive and not overlap.)

## Examples: Dimension hierarchies

The following two examples illustrate a basic dimension hierarchy that would be created in your datamart and then mapped into Campaign.

### Example: Age Dimension Hierarchy

**Lowest level**: (21–25), (26–30), (31–35), (36–45), (45–59), (60+)

**Rollups**: *Young* (18–35), *Middle* (35–59), *Older* (60+)

### Example: Income Dimension Hierarchy

**Lowest level:** >$100,000, $80,000–$100,000, $60,000–$80,000, $40,000–$60,000

**Rollups**: *High (> $100,000), Middle ($60,000–$100,000), Low (< $60,000)* (> $100,000), ($60,000–$100,000), (< $60,000)

## Creating dimension hierarchies

To use dimensions in Campaign, you must do the following:

- Define and create a hierarchical dimension in a table or delimited flat file in your data mart
- Map this hierarchical dimension table or flat file to a dimension in Campaign

**Note:** A hierarchical dimension is created in the data mart either by the Campaign system administrator or by members of your IBM Unica consulting team, and is an operation external to Campaign. Also note that the lowest level of the hierarchical dimension must use either raw SQL or a *pure*IBM Unica Expression (no custom macros, strategic segments, or derived fields) to define the individual elements.

When this hierarchical dimension is then mapped into Campaign, Campaign executes this code to perform the various roll-ups.

### To map a hierarchical dimension to a Campaign dimension

**Note:** The following instructions assume that a hierarchical dimension already exists in your data mart.

**Note:** Since in almost all cases dimensions will be used to create cubes, you may want to create dimensions from a flowchart in the **Sessions** area of the application.

1. Access the Dimension Hierarchies window from one of the following places:
    *   In a flowchart in **Edit** mode, click the **Admin** icon and select **Dimension Hierarchies**.
    *   On the Administrative Settings page, select **Manage Dimension Hierarchies**.

    The Dimension Hierarchies window appears.

2. Click **New Dimension**.

    The Edit Dimension window appears.

3. Enter the following information about the dimension you are creating:
    *   Dimension Name
    *   Description
    *   The number of levels in the dimension (in most cases, this should correspond to the levels in the hierarchical dimension in the data mart to which you are mapping this dimension).
    *   If you are using this dimension as the basis for a cube, ensure that the **Elements are Mutually Exclusive** check box is checked (Campaign checks this option by default). Otherwise, you will receive an error when you use this dimension to create a cube, since the values in elements cannot overlap in a cube.

4. Click **Map Table**.

    The Edit Table Definition window appears.

5. Select one of the following options:
    *   Map to Existing File.
    *   Map to Existing Table in Selected Database.

    Proceed with the steps for mapping a table. For details, see the *Campaign Administrator's Guide*.

    **Note:** When mapping tables for dimension hierarchies, the field names "Level1_Name," "Level2_Name," etc. must exist in the table for mapping to succeed.

    When you have finished mapping the table for the dimension, the Edit Dimension window appears with the dimension information for the new dimension.

6. Click **OK**.

    The Dimensions Hierarchies window appears with the newly mapped dimension visible.

7. To store a dimension hierarchy so that it is available for future use and does not need to be recreated, click **Save** on the Dimension Hierarchies window.

## To update a dimension hierarchy

Campaign does not support automatic updates of dimension hierarchies. If the underlying data changes, you must update the dimension hierarchies manually.

**Note:** Cubes are comprised of dimensions which are based on strategic segments, therefore you must update dimensions whenever strategic segments are updated.

1. Access the Dimension Hierarchies window from one of the following places:
   - In a flowchart in **Edit** mode, click the **Admin** icon and select **Dimension Hierarchies**.
   - On the Administrative Settings page, select **Manage Dimension Hierarchies**.

   The Dimension Hierarchies window appears.

2. Click **Update All**.

   **Note:** To update individual dimensions, select the dimensions, then click **Update**.

## To load a stored dimension hierarchy

1. Access the Dimension Hierarchies window from one of the following places:
   - In a flowchart in **Edit** mode, click the **Admin** icon and select **Dimension Hierarchies**.
   - On the Administrative Settings page, select **Manage Dimension Hierarchies**.

   The Dimension Hierarchies window appears.

2. Highlight the dimension hierarchies that you want to load and click **Load**.

## About cubes

A cube is the simultaneous segmentation of a list of IDs (most often a strategic segment) by the queries provided by a number of dimension hierarchies. After the cube is created, you can view segment cross-tab reports that drill into two dimensions of the cube at any given time.

Before you can create a cube, you must perform the following preliminary tasks:

- Create a strategic segment
- Create dimensions that are based on the strategic segment
- The following guidelines apply to cubes:
- Cube metrics can be defined as any Campaign expression with the following restrictions:
  - You can specify an unlimited number of additional NUMERIC metrics and Campaign will calculate min, max, sum, average for them. Selected metrics can be derived fields or persistent derived fields.
  - The aggregation function on cell count (min, max, avg, % of total no, and so on) is calculated automatically.
  - The aggregation function on an attribute value (for example, avg(age) ) automatically calculates min, max, sum, and average.
  - Expressions that contain multiple attribute values (for example, (attribute1 + attribute2) ) are supported in derived fields.
  - The Cube process supports derived fields and persistent derived fields.
  - Groupby expressions (for example, (groupby_where (ID, balance, avg, balance, (trxn_date > reference_date))) ) are supported in derived fields.
  - Expressions involving user variables (defined in same flowchart as cube process AND exposed to Distributed Marketing) are supported in derived and persistent derived fields. (For more information about Distributed Marketing, see the *Distributed Marketing User's Guide*.)

- – Expressions that use raw SQL are supported in a derived field that uses a raw SQL custom macro
- – Expressions that use a custom macro are supported in a derived field.
- Although cubes are composed of up to three dimensions, metrics can be displayed for only two dimensions at a time. The undisplayed third dimension is still computed and stored on the server, but is not used in visual selection/reporting for that particular report.
- Cubes can be built on cells as well as segments (which, for example, can be created at the transaction level). However, if a cube is built on a cell, the cube is available only in that flowchart. For that reason, you may want to base cubes on strategic segments.
- Unless your tables are normalized, defining dimensions with a many-to-many relationship with the audience level could produce unexpected results. The cube algorithm used by Campaign relies on normalized tables. Before you select and build a cube, normalize data by rolling it up (to the customer level through a data prep session for example).

  **Note:** If you build a cube on non-normalized dimensions, the sum counts will be wrong in the crosstab reports, owing to the way that Campaign processes the dimension IDs. If you must use non-normalized dimensions, build cubes with only two dimensions and use transactions as the lowest level metric of the nonnormalized dimensions, rather than customer IDs, since the transaction sum will be correct.
- When creating a cube dimension, you must give the dimension a name, audience level, and a table to correspond to the dimension. Later, when working in a session or a campaign flowchart, you map this dimension the same as if you were mapping a database table.
- Cubes should be built when users are not accessing them, typically after business hours and on weekends.

# Chapter 12. Reports

The following types of reports are available for Campaign:

- Standard reports: Included with Campaign. Access these reports from the Campaign Analytics page.
- Example reports in the Campaign Reports Pac: Available if Campaign is integrated with IBM Cognos®. Access these reports from the Campaign Analytics page or the Analysis tab for a specific object, such as a campaign or offer.
- Example reports for related products: Available if Campaign is integrated with IBM Cognos and you installed report packs for the Campaign-related products, including eMessage, Interact, or Distributed Marketing. Access these reports from the Analytics page for each product and from the Analysis tab for a specific object, such as a campaign or offer. For more information, see the documentation for those products.
- Flowchart cell reports, which provide information about cells in a particular flowchart in a session or campaign. Access cell reports by using the Reports icon when you view a flowchart in Edit mode.

## Report types

Campaign supports three general types of reports:

- **System-wide reports** — reports across multiple objects within Campaign. These reports are accessed from the Campaign Analytics page, which is launched from the Analysis link on the main navigation pane. For example, from the folders on the Campaign Analytics page, you can access the Calendar of Campaigns report, which displays all campaigns in the system in a calendar format.
- **Object-specific reports** — reports pertaining to a specific object (a campaign or offer). These reports are accessed through an object's Analysis tab. For example, from a campaign's Analysis tab, you can access the Campaign Performance Summary by Offer report, which provides a summary of campaign and offer performance with offers grouped by the corresponding campaigns.
- **Flowchart cell reports** — reports that provide a variety of information relating to the cells in a particular flowchart in a session or campaign. Cell reports can be accessed by clicking the **Reports** icon when you view a flowchart in Edit mode.

**Note:** Access to an object's flowcharts, Analysis tab, and Campaign Analytics page depends on your permissions.

## Campaign list portlets

This section describes the standard Campaign portlets that are available for use on dashboards even if the Campaign reports package is not installed.

| Report | Description |
| --- | --- |
| My Custom Bookmarks | A list of links to websites or files created by the user viewing the report. |
| My Recent Campaigns | A list of the most recent campaigns created by the user viewing the report. |

| Report | Description |
| --- | --- |
| My Recent Sessions | A list of the most recent sessions created by the user viewing the report. |
| Campaign Monitor Portlet | A list of the campaigns that have run or are currently running that were created by the user viewing the report. |

# Campaign IBM Cognos report portlets

This section describes the dashboard portlets that are available in the Campaign reports package.

| Report | Description |
| --- | --- |
| Campaign Return on Investment Comparison | An IBM Cognos report comparing, at a high level, the ROI of campaigns created or updated by the user viewing the report. |
| Campaign Response Rate Comparison | An IBM Cognos report comparing the response rates of one or more campaigns created or updated by the user viewing the report. |
| Campaign Revenue Comparison by Offer | An IBM Cognos report comparing the revenue received to date per campaign containing offers created or updated by the user viewing the report. |
| Offer Responses for Last 7 Days | An IBM Cognos report comparing the number of responses that were received over the last 7 days based on each offer created or updated by the user viewing the report. |
| Offer Response Rate Comparison | An IBM Cognos report comparing the response rate by offer created or updated by the user viewing the report. |
| Offer Response Breakout | An IBM Cognos report showing the various active offers created or updated by the user viewing the report, broken out by status. |

# Working with reports

The following sections provide information about using reports in Campaign.
- "Accessing and viewing reports"
- "Report controls" on page 202
- "The Reports toolbar" on page 202
- "To send a report by email" on page 202
- "Viewing reports in various formats" on page 203
- "Re-running reports" on page 204

## Accessing and viewing reports

Access to reports is dependent on your access permissions to an object or function. For example, if you do not have permissions to edit flowcharts, you will not be able to access the cell reports for flowcharts.

Reports are accessible from these sections of Campaign:
- **The Campaign Analytics link in the Analytics menu** — this link opens the Campaign Analytics page, which displays folders for all available reports in Campaign. Click the link for a folder to view subfolders or lists of reports you can run. Reports are listed with a modified date and time.

- **The Analysis tab of an object** — displays links to reports for this campaign, offer, or segment. You select the type of report to view from the **Report Type** drop-down list at the top right of the page.
- **A flowchart page in Edit mode** — The **Reports** link at the top of the page opens cell reports for the flowchart. Access to cell reports and the ability to export cell reports are dependent on your access permissions.

## To view reports from the Campaign Analytics page

1. Select **Analytics > Campaign Analytics**.

   The Campaign Analytics page appears, displaying folders for the available reports in Campaign.
2. Click the folder containing the reports you want to view. You see a page displaying the folder contents, including subfolders, if any.
3. Click the link for the report you want to view. If the report allows filtering, the Report Parameter window opens.
4. Select one or more objects on which to filter the report. Note that only the specific objects to which you have access will appear for selection. For reports allowing multiple object selection, select multiple objects by holding down the **Ctrl** key while selecting.
5. When you have finished selecting objects for the report, click **Generate the Report**. The report displays in the same window.

## To view reports from a campaign's Analysis tab

1. Select the campaign on which you want to report. You see the Campaign Summary page.
2. Click the **Analysis** tab. You see the Report Type drop-down list at the top right of the page.
3. Select the type of report you want to view from the drop-down list. The report displays in the same window.

## Campaign page Analysis tab icons

The Campaign page Analysis tab uses the following icons.



The icons, left to right, are described in the following table.

**Note:** Many of the icons in the Campaign interface are associated with features that require permissions. For more information, see the *Marketing Platform Administrator's Guide*.

*Table 19. Icons for the Campaign page Analysis tab*

| Icon Name | Description |
|---|---|
| Print this Item | Click this icon to print the list of flowcharts on the Analysis tab. |
| Move this Campaign | Click this icon to specify a new location to move the campaign. |
| Delete this Campaign | Click this icon to delete the campaign. |

### To view cell reports from a flowchart

Access to cell reports is dependent on your permissions. For example, if you do not have permissions to edit or review (edit without save) flowcharts, you will not be able to access the cell reports for a flowchart. In addition, you must have explicit access to view cell reports, or to export cell reports. For details, see the *Campaign Administrator's Guide* for descriptions of the cell reports-related permissions for the system-defined Administrative Role.

1. In a flowchart in **Edit** mode, click the **Reports** icon. The Cell Specific Reports window opens. By default, the Cell List report is displayed. You see the Report to View drop-down list at the top right.

2. Select the type of report you want to view from the drop-down list. The report displays in the same window.

3. (Optional) You can click **Options** select a view setting, or click **Print** or **Export** to print or export the current cell report.

## Report controls

When you generate a report for viewing, the following controls and information are available:

- **Report generation time** — displayed at the bottom right of the report page.
- **Report generation date** — displayed at the bottom left of the report page.
- **Top/Bottom control** — click these links to display the top or bottom of the report. Only displayed if the current report spans more than one page.
- **Page up/Page down control** — click these links to display the previous or next page of the report. Only displayed if the current report spans more than one page.

## The Reports toolbar



**Note:** The Reports toolbar is displayed only for reports generated by Cognos. It is not available for the calendar or segment reports, or for the cell reports within flowcharts.

When a report is generated, you see the Reports toolbar, from which you can perform the following tasks:

- **Keep this version**: Send the report by email
- **Drill Down/Drill Up**: Used for reports that support dimensional drilling.
- **Related links**: Used for reports that support dimensional drilling.
- **View format**: The default viewing format for reports is HTML. You can choose other viewing formats from the drop-down list. The viewing format icon changes depending on the currently selected view option.

## To send a report by email

This option requires that your SMTP server be set up to work with Cognos. If this feature is not available, please see your reports administrator.

If you acquired your Cognos license with your IBM Unica products, the option to include a link to the report is not supported. To use this feature, you must purchase a full license for Cognos.

1. After the report has finished running, click **Keep this version** in the Reports toolbar and select Email Report from the drop-down list. You see the Set the email options page, where you specify the recipients of the email, and optional message text.

2. To send the report as an attachment in the email message, select the **Attach the report** checkbox and clear the **Include a link to the report** checkbox.

3. Click **OK**. The request is sent to your email server.

# Viewing reports in various formats

**Note:** Not all reports can be viewed in all formats. For example, reports that use multiple queries cannot be viewed in CSV or XML formats.

The report viewer allows you to view the report in these formats:

- HTML
- PDF
- Excel
- CSV
- XML

### To view a report in HTML format

HTML is the default view for reports. If you are viewing a report in another format, you can switch back to HTML by clicking the **View format** icon on the Reports toolbar and selecting **View in HTML Format** from the drop-down list. After the page refreshes, you can use the Report controls to navigate through the report, if it spans more than one page.

### To view a report in PDF format

After generating a report, click the **View format** icon on the Reports toolbar and select **View in PDF Format** from the drop-down list. The page refreshes, and the report displays in PDF format. You can save or print the report using the PDF reader controls.

### To view a report in Excel format

After generating a report, click the View format icon on the Reports toolbar, then use the View in Excel Options. When prompted, specify whether to open or save the file:

- To view the report without saving it, click Open. The report displays as a single page in Excel format.
- To save the report, click Save and follow the prompts.

### To view a report in CSV (comma-separated value) format

After generating a report, click the **View format** icon on the Reports toolbar, click **View in Excel Options** and select **View in CSV Format** from the drop-down list. A new window opens. You see a window asking whether you want to open or save the file.

- To view the report without saving it, click **Open**. The report displays as a single page in a spreadsheet format.
- To save the report, click **Save**. The Save As window opens. Navigate to the location where you want to save the file, and enter a name in the **File name** field. (By default, the file is saved as an .xls file.) Click **Save**. When the file has finished saving, you see the Download complete window.

### To view a report in XML format

After generating a report, click the View format icon on the Reports toolbar and select View in XML Format from the drop-down list. The page refreshes and the report is displayed as XML in the same window.

## Re-running reports

Reports are generated against the data source so that they reflect the latest data. If you believe that the data has changed since the report you want to view was last run and want to view an up-to-date version, you can re-run the report.

# List of reports in Campaign

This section describes the reports available in Campaign, grouped in the following categories:

**Standard reports:**
- "Flowchart cell reports"
- "Segment Crosstab reports" on page 210
- "Calendar of Campaigns" on page 210

Reports provided in the Campaign Reports Pack (optional):
- "Campaign and offer listings reports" on page 210
- "Performance reports" on page 211

For more information on installation and configuration of IBM Unica reporting, see the installation guide and the *IBM Unica Marketing Platform Administrator's Guide*.

For detailed information about the data items, queries and expressions used in each report, see the *IBM Unica Campaign Report Specifications document*.

## Flowchart cell reports

Cell reports provide a variety of information relating to the cells in a particular flowchart in a session or campaign. All cell reports can be accessed from the Reports menu when you view a flowchart in Edit mode.

Campaign supports the following types of cell reports:
- "Cell List report" on page 205
- "Cell Variable Profile report" on page 205
- "Cell Variable Crosstab report" on page 207
- "Cell Content report" on page 208
- "Cell Waterfall report" on page 208

## To print and export cell reports

You can print any cell report or export it to an Excel spreadsheet by clicking on the **Print** or **Export** button at the top of the Cell Specific Reports page.

## Cell List report
Cell List reports provide information about all the cells used in the current flowchart. The information is a result of the cell outputs from all processes run on the flowchart.

**To generate a Cell List report:**
1. Open an existing flowchart in Edit mode, or create a new flowchart.
2. Click the **Reports** icon.

   The Cell Specific Reports window appears, with the Cell List report displayed by default. Each cell in the flowchart displays on one row in the report.

   The report shows data from the last run of the flowchart. The status column indicates the type of flowchart run that was executed: test run or production run.
3. (Optional) To toggle the display between Tree View and Table View, click Options. You see the Report Options window, where you can select one of the following options:
   - Tree View — view the flowchart cells in a tree view which simulates a folder hierarchy. The levels in this view represent ths levels in the flowchart. Higher level folders can be expanded or collapsed to show or hide the items below.
   - Table View — view the flowchart cells in a table format. This is the default option.

## Cell Variable Profile report
The Cell Variable Profile report displays the data associated with one variable of a specified cell. For example, the following figure shows the Gold.out cell (for those clients with gold credit cards) of the Multi-channel Retention campaign. The Age-Range variable is displayed to show the age range of those who belong to the Gold.out cell.

**Cell Variable Profile report**

**To generate a Cell Variable Profile report:**

1. Open an existing flowchart in **Edit** mode, or create a new flowchart

2. Click the **Reports**icon. The Cell Specific Reports window appears, with the Cell List report displayed by default. Each cell in the flowchart displays on one row in the report.
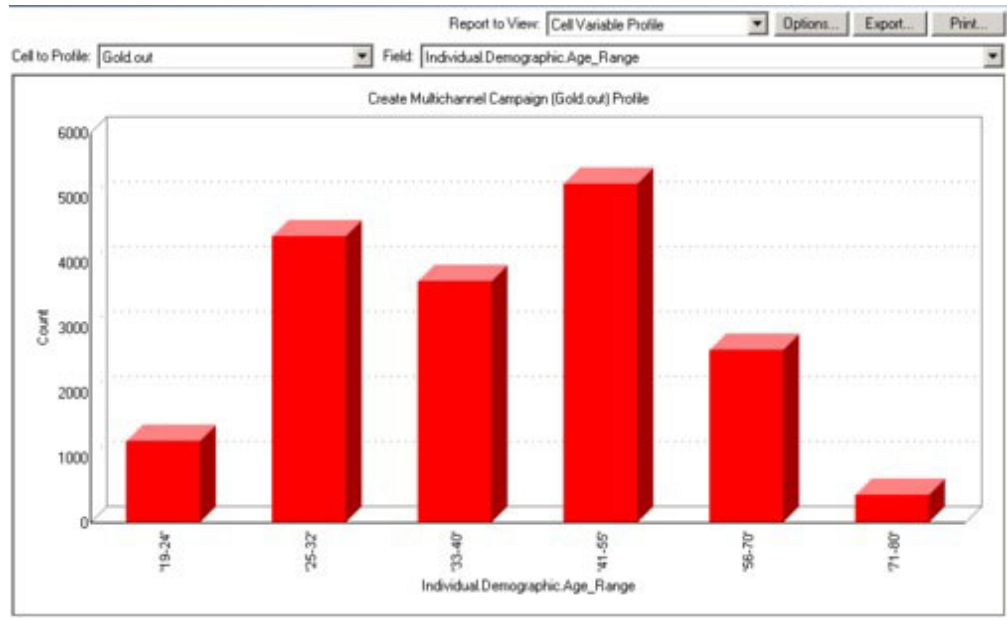
3. Select **Cell Variable Profile** from the **Report to View** drop-down list.

4. Select the cell you want to profile from the **Cell to Profile** drop-down list.

5. Select a field on which to profile the selected cell, from the **Field** drop-down list.

6. Campaign generates a cell variable profile based on the cell and field you selected.

7. (Optional) To modify the report display, click Options. You see the Report Options window, where you can select from the following options:

   - Number of Bins — Enter the number of bins you want to report to display. The field values along the horizontal axis are organized into bins. If the number you specify is less than the number of different field values, some fields will be joined in one bin. The default is 25.

   - Profile By Meta Type — Click to profile by metadata. For more information on profiling by metadata, see Profiling by meta type. This option is enabled by default.

   - View Table — View the report in a table format. Each bin is represented as a row, with the count for each bin as a column.

   - View Plot — View the report as a graph. This is the default option. When you view a two- or three-dimensional report, you can right-click on the report to access more display options.

   - Show 2nd Cell — If more than one cell is available for profiling, select this option to view a second cell in the report. When you select this option, you see a drop-down list from which you select an additional cell to profile. The two cells are then displayed side by side in graphical format.

## Cell Variable Crosstab report

The Cell Variable Crosstab report displays details for a cell profiled by two fields simultaneously. The report divides each selected field into a number of bins, and the size of the box at each intersection represents the relative number of customer IDs that have the selected attributes. For example, in the following figure, two records from the Gold.out cell are profiled: funds (Indiv._Total_Funds) by name (First_Name). Another example might be age by amount purchased.

**Note:** The process from which the cell is generated must be fully configured and must run successfully in order to profile the cell.

Cell Variable Crosstab report



**To generate a Cell Variable Crosstab report:**

1. Open an existing flowchart in **Edit** mode, or create a new flowchart.
2. Click the **Reports** icon. The Cell Specific Reports window appears, with the Cell List report displayed by default. Each cell in the flowchart displays on one row in the report.
3. Select **Cell Variable Crosstab** from the **Report to View** drop-down list.
4. Select a cell from the **Cell** drop-down list.
5. Select fields (variables) to profile from the **Field 1** and **Field 2** drop-down lists.

   Campaign generates the report based on your selections.
6. (Optional) To modify the report display, click Options. You see the Report Options window, where you can select from the following options:
   - Number of Bins — Change the number of bins displayed. The field values along the horizontal axis are organized into bins. If the number you specify is less than the number of different field values, some fields will be joined in one bin. The default is 10.
   - Profile By Meta Type — Click to profile by metadata. For more information on profiling by metadata, see Profiling by meta type. This option is enabled by default.

- View Table — Select to view the report as a table.
- View 2-D Plot — elect to view the report as a 2-D plot graph (the default). When viewing a two or three dimensional report, you can right click on the report to access an array of display options.
- View 3-D Plot — Select to view the report as a 3-D plot graph. When viewing a two or three dimensional report, you can right click on the report to access an array of display options.
- Cell 1 Display — Select the way the cell information is displayed in the X-axis. For certain numeric fields, you can select fields to operate on from the Value Field drop-down menu.
- Value Field — (For both Cell 1 Display and Cell 2 Display). Add a variable to the existing variable being profiled. This second variable will appear as a box within the box that represents the first variable.

## Cell Content report

The Cell Content report displays details of the records within a cell. You can display values from any table sources defined at the current audience level. This report is useful for verifying the results of runs.

**To generate a Cell Content report:**

1. Open an existing flowchart in Edit mode, or create a new flowchart.
2. Click **Reports** icon. The Cell Specific Reports window appears, with the Cell List report displayed by default. Each cell in the flowchart displays on one row in the report.
3. Select **Cell Content** from the **Report to View** drop-down list.
4. Select a cell from the **Cell To View** pull-down menu.
5. (Optional) To modify the report display, click **Options**. You see the Report Options window, where you can select from the following options:
   - Max. number of rows to view — Change the maximum number of rows that the report displays. The default is 100.
   - Fields to View — Select fields to view in the report by selecting fields in the Available Fields area and adding them to the Fields to View area.
   - Skip Records with Duplicate IDs — Choose to skip records with duplicate fields. This is useful if you are using non-normalized tables. This option is disabled by default.

## Cell Waterfall report

The Cell Waterfall report shows the falloff of audience members as cells are input and output through the various processes in a flowchart. This report identifies processes which have reduced output volume and the details of the reduction by percentage and quantity. Use Cell Waterfall reports to refine target counts by viewing the falloff incurred by each successive criteria.

In the following example, the report profiles the Gold.out cell from the Gold process in the Multi-Channel Retention Campaign flowchart.

The IDs in the Gold.out cell are passed to the Merge process named Eligible. The output cell of the Merge process, Eligible.out, adds 7683 IDs to Gold.out, which then is merged with the Planinum.out cell, resulting in an increase rather than a decrease in the number of IDs. Because of the Opt Outs process, some IDs are extracted from the merged result of Gold.out and Platinum.out, resulting in a number less than the sums of the two cells. Next, the Eligible.out cell is passed to a Segment process called Value Tiers, where Eligible.out is parsed into several different contact channels.

The Cell Waterfall report based on this flowchart is shown in the following figure.

The Totals row in the Cell Waterfall report shows that 10,705 IDs were removed from the Gold.out cell. The report also displays the number IDs remaining, as well as the percentage of original Gold.out IDs remaining.

**Cell Waterfall report for Multi-Channel Retention Campaign flowchart**

**Cell Specific Reports**

Report to View: Cell Waterfall    Options...    Export...    Print...

Cell: Gold.out

| Cell Name | Size | #IDs Removed | %Remain | Seq% | #IDs (Removal Query) | Removal Query |
|---|---|---|---|---|---|---|
| Gold.out | 18688 | 0 | 100.00 | | | |
| Eligible.out | 26371 | Added 7683 | 141.11 | 0.00 | 5987 | Individual.EMail_Op |
| Value Tiers | 26371 | 0 | 141.11 | | | |
| Preferred_Channel_Direct_Mail | 7911 | | | 30.00 | | |
| Preferred_Channel_E_Mail | 7861 | | | 29.81 | | |
| Preferred_Channel_Telemarketing | 2616 | | | 9.92 | | |
| Preferred_Channel_Unknown | 7983 | | | 30.27 | | |
| | | | | | | |
| Total | 18688 | 10705 | 42.72 | | | |

# Segment Crosstab reports

Segment crosstab reports are accessed from the Analysis section of Campaign, and consist of the following individual reports:

- "Segment Crosstab Analysis"
- "Segment Profile Analysis"

## Segment Crosstab Analysis

The Segment Crosstab Analysis report calculates detailed information about any two dimensions in a cube, as defined in a Cube process, and displays the results in tabular format. This report allows you to drill into cells and create a Select process that can then be used in a campaign or session flowchart.

Only strategic segments or cells that are part of a cube are available to be analyzed in the Segment Crosstab Analysis report.

## Segment Profile Analysis

The Segment Profile Analysis report calculates and displays the count for a strategic segment's dimensions. The information is displayed in both tabular and graphical views. Only strategic segments that are part of a cube are available to be analyzed in the Segment Profile Analysis report.

# Calendar of Campaigns

The Calendar of Campaigns report allows you to view the campaign start and end dates on a calendar.

# Campaign and offer listings reports

Campaign and offer listings reports are available only with the installation of IBM Unica reporting and the Campaign reports pack. For information on installing and configuring IBM Unica reporting, see the installation guide and the *IBM Unica Campaign Administrator's Guide*.

Campaign and offer listings reports are accessed from the Analysis section of Campaign, and consist of the following individual reports:

- "Campaign Summary"
- "Offer Campaign Listings"

## Campaign Summary

The Campaign Summary report provides an overview of all campaigns that have been created. It lists the campaign code, creation date, start and end dates, last run date, initiative and objective of each campaign.

## Offer Campaign Listings

The Offer Campaign Listings report lists campaigns grouped by offers. It lists the campaign code, initiative, start and end dates and last run date.

# Performance reports

Performance reports are available only with the installation of IBM Unica reporting and the Campaign reports pack. For information on installing and configuring reporting, see the installation documentation and the *IBM Unica Marketing Platform Administrator's Guide*.

For examples of output from performance reports, see the IBM Unica Campaign Report Specifications document.

Performance reports are accessed from the Analysis section of Campaign, and consist of the following individual reports:

- ""What If" Offer Financial Summary"
- "Campaign Detailed Offer Response Breakout" on page 212
- "Campaign Financial Summary by Offer (Actual)" on page 212
- "Campaign Offer Performance by Month" on page 212
- "Campaign Performance Comparison" on page 212
- "Campaign Performance Comparison (with Revenue)" on page 212
- "Campaign Performance Comparison by Initiative" on page 212
- "Campaign Performance Summary by Cell" on page 212
- "Campaign Performance Summary by Cell (with Revenue)" on page 212
- "Campaign Performance Summary by Cell and Initiative" on page 212
- "Campaign Performance Summary by Offer" on page 213
- "Campaign Performance Summary by Offer (with Revenue)" on page 213
- "Offer Performance by Day" on page 213
- "Offer Performance Comparison" on page 213
- "Offer Performance Metrics" on page 213
- "Offer Performance Summary by Campaign" on page 213

## "What If" Offer Financial Summary

The "What If" Offer Financial Summary report calculates the hypothetical financial performance of an offer based on your input. You specify parameters for evaluating different response rate scenarios. The report calculates financial performance for six scenarios, incrementing upward based on your specified response rate and the response rate increment. For example, if you specify a response rate of 2% and a response rate increment of 0.25%, the report will return performance data for six scenarios with response rates ranging from 2% to 3.25%.

You can optionally change parameters in the "what-if" report, such as cost per contact, offer fulfillment fixed cost and revenue per response.

### Campaign Detailed Offer Response Breakout

The Campaign Detailed Offer Response Breakout report provides campaign performance data for different response types. It lists all offers associated with a campaign and the number of responses for each response type.

### Campaign Financial Summary by Offer (Actual)

The Campaign Financial Summary by Offer (Actual) report provides financial data for offers within campaigns. It includes data such as contact costs, gross revenue, net profit, and ROI.

### Campaign Offer Performance by Month

The Campaign Offer Performance by Month report shows campaign performance for a specified month with performance data for each offer within the campaign. It lists the number of offers given, number of response transactions, and response rate for the specified month.

### Campaign Performance Comparison

The Campaign Performance Comparison report compares the financial performance of campaigns. It includes data such as response transactions and response rate, number of unique responders and responder rate. It also includes lift over control group information.

### Campaign Performance Comparison (with Revenue)

The Campaign Performance Comparison (with Revenue) report compares the financial performance of selected campaigns. It includes data such as response transactions, response rate, number of unique responders, responder rate and actual revenue. It also includes optional lift over control group information.

### Campaign Performance Comparison by Initiative

The Campaign Performance Comparison by Initiative report compares the financial performance of selected campaigns grouped by their initiatives. It includes data such as response transactions and response rate, number of unique responders and responder rate. It also includes optional lift over control group information.

### Campaign Performance Summary by Cell

The Campaign Performance Summary by Cell report provides performance data for campaigns with cells grouped by the corresponding campaigns. It includes data such as the number of offers given, number of response transactions, response rate, number of unique responders and responder rate. It also includes lift over control group information.

### Campaign Performance Summary by Cell (with Revenue)

The Campaign Performance Summary by Cell (with Revenue) report provides performance data for selected campaigns with cells grouped by the corresponding campaigns. It includes data such as number of offers given, number of response transactions, response rate, number of unique responders, responder rate and actual revenue. It also includes optional lift over control group information.

**Note:** This report requires the additionally tracked field Revenue in the response history table.

### Campaign Performance Summary by Cell and Initiative

The Campaign Performance Summary by Cell and Initiative report provides performance data for selected campaigns with cells grouped by the corresponding

campaigns and initiatives. It includes data such as number of offers given, number of response transactions, response rate, number of unique responders and responder rate. It also includes optional lift over control group information.

## Campaign Performance Summary by Offer

The Campaign Performance Summary by Offer report provides a summary of campaign and offer performance with selected offers grouped by the corresponding campaigns. It includes data such as number of offers given, number of response transactions, response rate, number of unique responders, and responder rate. It also includes lift over control group information.

## Campaign Performance Summary by Offer (with Revenue)

The Campaign Performance Summary by Offer (with Revenue) report provides a summary of offer performance for selected campaigns. It includes data such as number of offers given, number of response transactions, response rate, number of unique responders, responder rate and actual revenue. It also includes optional lift over control group information.

## Offer Performance by Day

The Offer Performance by Day report shows offer performance for a specified date or date range. It lists the number of offers given, number of response transactions, and the response rate during the specified date or date range.

## Offer Performance Comparison

The Offer Performance Comparison report compares the performance of selected offers. It includes data such as the number of offers given, number of response transactions, response rate, number of unique responders, and responder rate. It also includes lift over control group information.

## Offer Performance Metrics

The Offer Performance Metrics report compares the performance of selected offers based on various response attributions, such as Best Match, Fractional Match and Multiple Match. It also includes optional lift over control group information and percentage differences between various attribution rates.

## Offer Performance Summary by Campaign

The Offer Performance Summary by Campaign report provides a summary of the performance of selected offers by campaign. It includes data such as number of offers given, number of response transactions, response rate, number of unique responders, and responder rate. It also includes lift over control group information.

# Appendix. Special characters in IBM Unica Campaign object names

Names of objects in Campaign can have specific requirements. Some special characters are not supported in any Campaign object names. In addition, some objects have specific naming restrictions.

**Note:** If you pass object names to your database (for example, if you use a user variable that contains a flowchart name), you must ensure that the object name contains only characters supported by your particular database. Otherwise, you will receive a database error.

## Special characters not supported

Do not use any of the characters listed in the following table in the names of these objects:

- campaigns
- flowcharts
- folders
- offers
- offer lists
- segments
- sessions

*Table 20. Special characters not supported*

| Character | Description |
|-----------|-------------|
| % | Percent |
| * | Asterisk |
| ? | Question mark |
| &#124; | Pipe (vertical bar) |
| : | Colon |
| , | Comma |
| < | Less than symbol |
| > | Greater than symbol |
| & | Ampersand |
| \ | Backward slash |
| / | Forward slash |
| " | Double quotation mark |

## Objects with no naming restrictions

The following objects in Campaign have no restrictions for characters used in their names:

- audience levels (audience level *field* names have naming restrictions)

- custom attribute *display* names (custom attribute *internal* names have naming restrictions)
- offer templates

## Objects with specific naming restrictions

The following objects in Campaign have specific restrictions on their names:

- custom attribute *internal* names (custom attribute *display* names have no naming restrictions).
- audience level *field* names (audience level names have no naming restrictions)
- cells
- derived fields
- user table and field names

For these objects, names must:

- contain only alphabetic or numeric characters, or the underscore (_) character
- start with an alphabetic character

**Note:** Derived field names have additional restrictions. For details, see "Naming restrictions for derived fields" on page 167.

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